



FM9 - Mechanics Handbook
Created on Thursday, August 14, 2008

Table of Contents

Introduction.....	1
Work Order Management	2
Understand Basic Workflow Processing	2
Work Order Life Cycle Statuses.....	4
Adding a Job to a Work Order.....	6
Adding Notes to a Work Order.....	18
Printing a Work Order	23
Labor Charges.....	31
Enter Time in Labor Time Card (Work Order)	31
Enter Time in Labor Time Card (Indirect Account).....	41
Correct Hours Worked on a Job/Indirect Account	45
Delete a Labor Entry.....	48
Vehicle Information	55
Displaying Basic Unit Information.....	55
Queries	65
Running a Work Order Query	65
Running Tech Spec/Unit Item Query	71

Introduction

This manual is a quick reference guide for the State of Tennessee mechanics within the garages and other agency maintenance locations.

This manual provides step-by-step instructions related to your daily activities in the garage. In this reference, you find information for the following processes in the M5 system:

- Managing work orders
- Entering daily working time
- Viewing basic vehicle information
- Running reports

Work Order Management

In the Work Order Management lesson, you learn about the following:

- Basic workflow processes
- Work order life cycle statuses
- Adding a job to an open work order
- Adding notes to an open work order
- Printing a work order

Understand Basic Workflow Processing

Work Order processing in FleetFocus M5 begins with the Work Order Main screen.

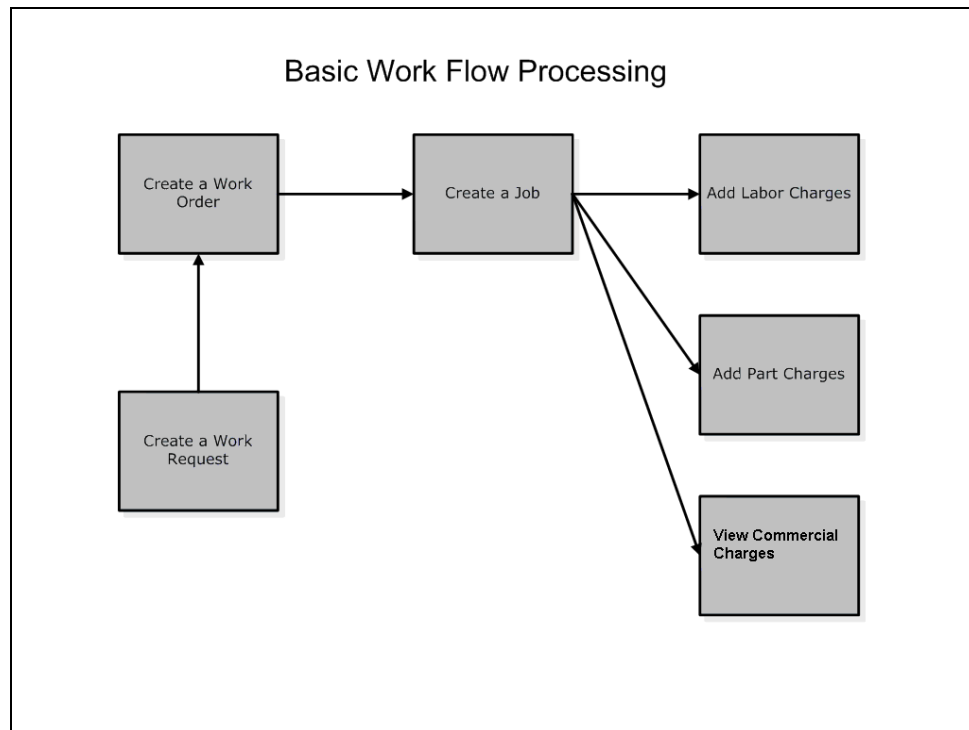
You can have only one work order per unit per maintenance location since an open work order designates downtime. Multiple tasks can be added to the work order as individual jobs.

A job code designates a combination of a work accomplished code, system code, and component code. This code defines the type of work that will be performed on a piece of equipment.

The system and component codes can come from the standard ATA (American Trucking Association) codes or can be customized (by the System Administrator only). Each job has its own visit reason and trend in downtime status codes (e.g., "waiting for parts" or "waiting for assignment").

Procedure

In this topic, you learn the basic workflow process in M5.



Step	Action
1.	In M5, a work request refers to any future maintenance that is to be completed for a unit, department, or component.
2.	<p>A work request can be generated in any of the following ways:</p> <ul style="list-style-type: none"> • User • Automatically by Forecaster for preventative maintenance jobs • Campaign/Recall • Deferred from a work order <p>To complete a work request, you must add it to a work order.</p>
3.	Work orders are used to record information about equipment maintenance and work performed for departments or components.
4.	<p>The work flow process in M5 is job-centric.</p> <p>A job must be created before you can make labor charges, part charges, or commercial charges.</p>
5.	<p>After the job has been performed, you will need to add any incurred labor and/or part charges to the work order.</p> <p>These charges must be added before you can close a work order.</p>
6.	Commercial charges can only be viewed, as these amounts are interfaced from PeopleSoft.

Step	Action
7.	Congratulations! You now know how M5 processes workflow. End of Procedure.

Work Order Life Cycle Statuses

A work order can be in any of 4 different statuses: open, complete, closed, and cancelled.

When the work order is in **Open** status, you can insert any transactions such as labor, part and/or commercial charges.

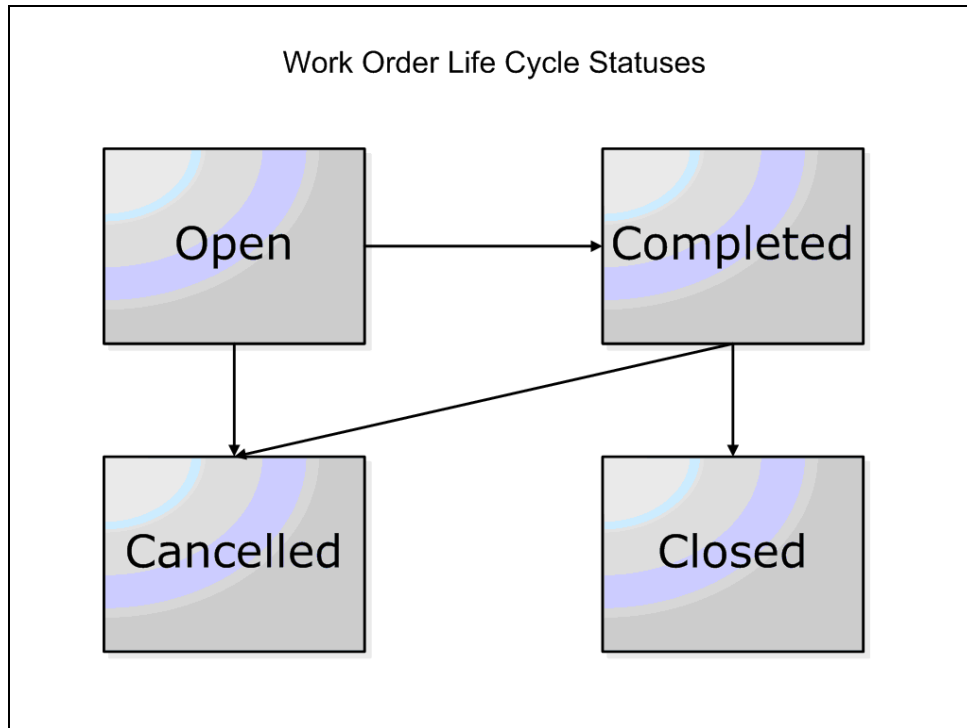
When the work order is in **Complete** status, this signals that all jobs are complete and the unit is back on the road. You are still able to make any needed changes or add charges in the complete status.

When a work order is in **Canceled** status, you cannot make any changes. In addition, prior to canceling the work order, you must remove any charges before it can be canceled.

When a work order is in **Closed** status, no changes can be made unless you have the database user privilege to do so.

Procedure

In this topic, you learn the work order life cycle statuses in the M5 system.



Step	Action
1.	In the Open status (" O "), a unit is considered out-of-service and accumulating maintenance and operational downtime.
2.	In this status, you can post labor, parts and commercial charges against the work order.
3.	In the Completed status (" D "), all jobs should be completed on the work order and the unit is placed back in service.
4.	You can still post labor, part, and commercial charges to a completed work order.
5.	A work order can be placed in Closed status (" C ") after all jobs have been completed and all charges have been applied.
6.	You cannot close a work order if there is: <ul style="list-style-type: none"> • A pending part purchase order • An outstanding vendor repair
7.	A work order can also be placed in Canceled status (" X "). You cannot cancel a work order if there are any charges made to the work order.
8.	You must first remove all charges before a work order can be canceled.
9.	Congratulations! You now know the work order life cycle status in the M5 system. End of Procedure.

Adding a Job to a Work Order

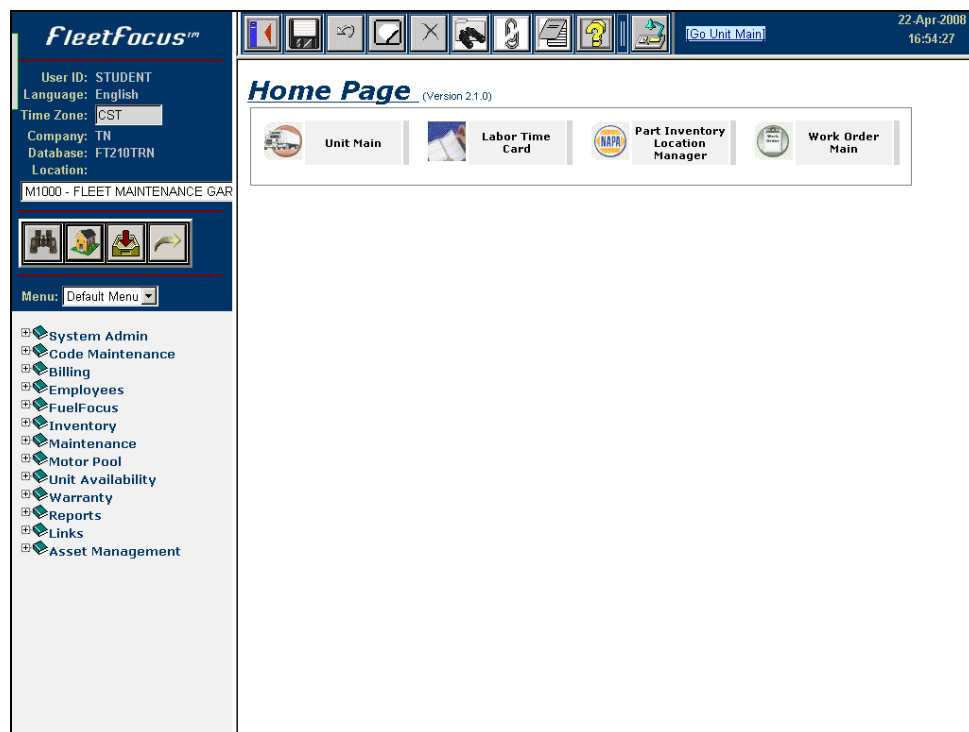
After a work order has been created, you can add a job to the work order to specify the type of required maintenance.



You add the job by accessing the **Work Order Processing** frame and selecting the appropriate work order to which the job will be added.



Each job added to a work order will require estimated hours be entered. Standard jobs will have the estimated hours default in for you. Any job that is not a standard job will require that you enter estimated hours manually.

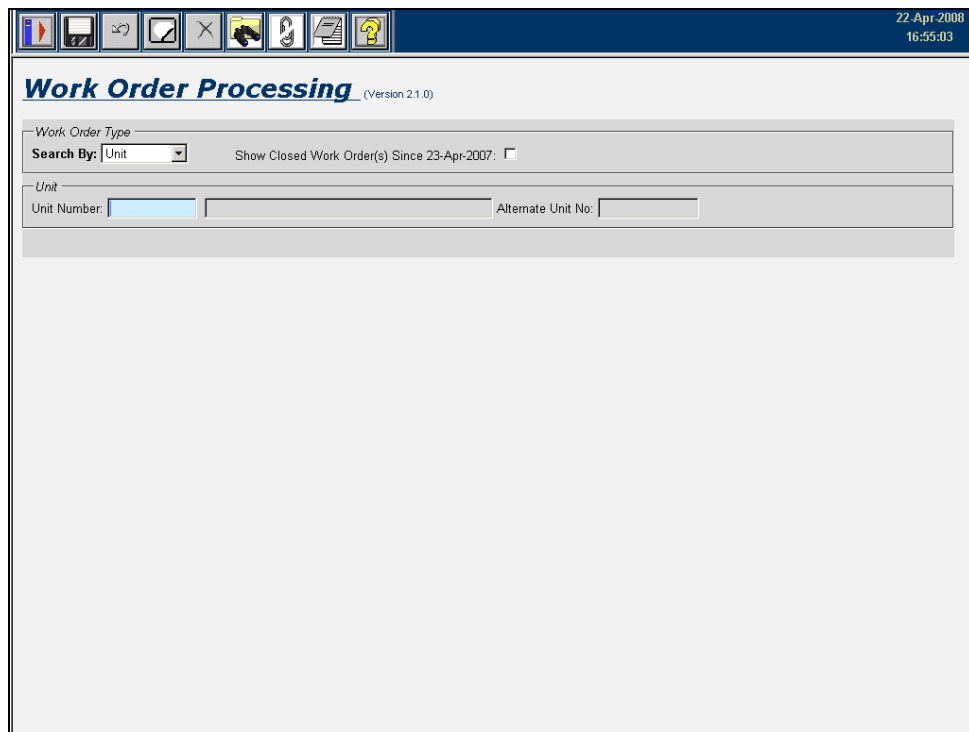
Procedure



In this topic, you learn how to add a job to an open work order.

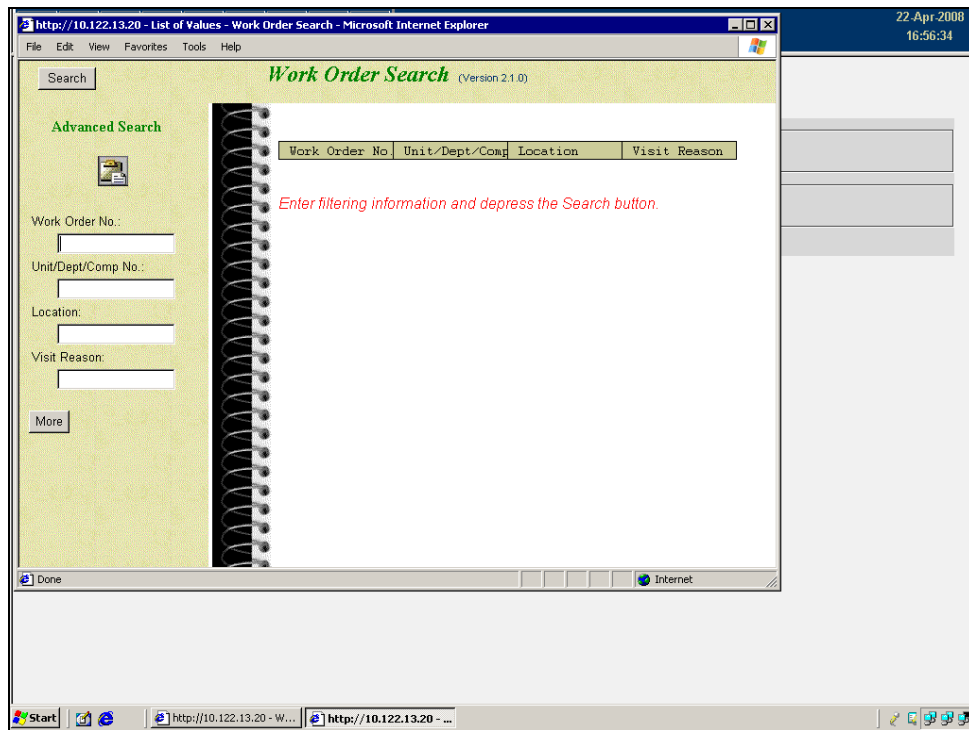





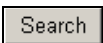
Step	Action
1.	Click the Maintenance button.  Maintenance
2.	Click the Work Order button.  Work Order

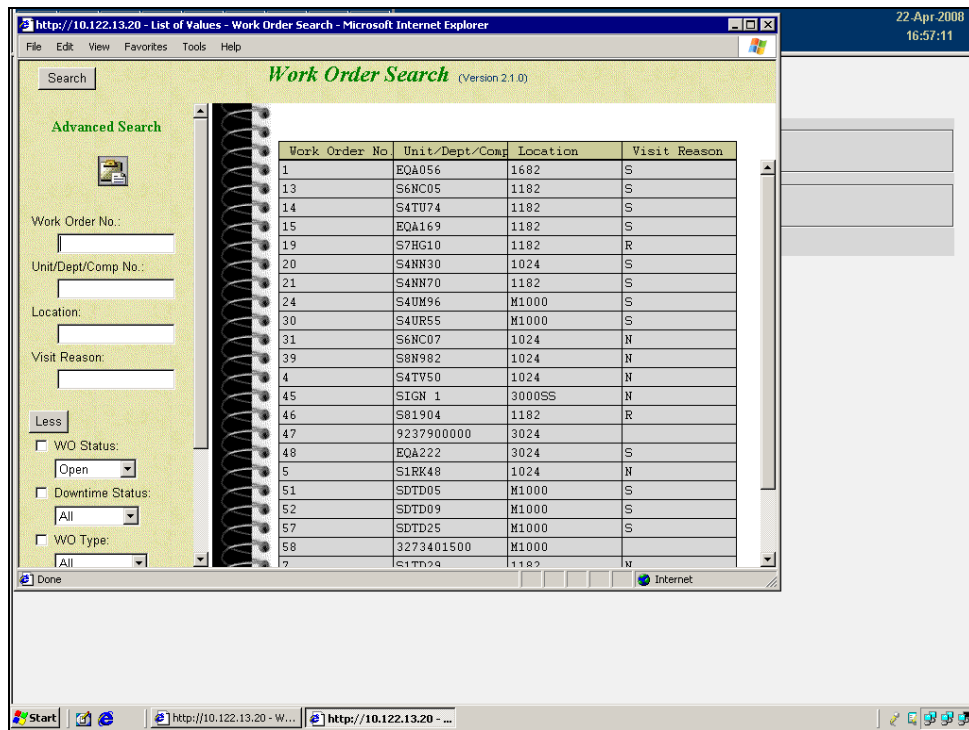
Step	Action
3.	Click the Processing link. 
4.	Click the Hide Menu button to view the full screen. 



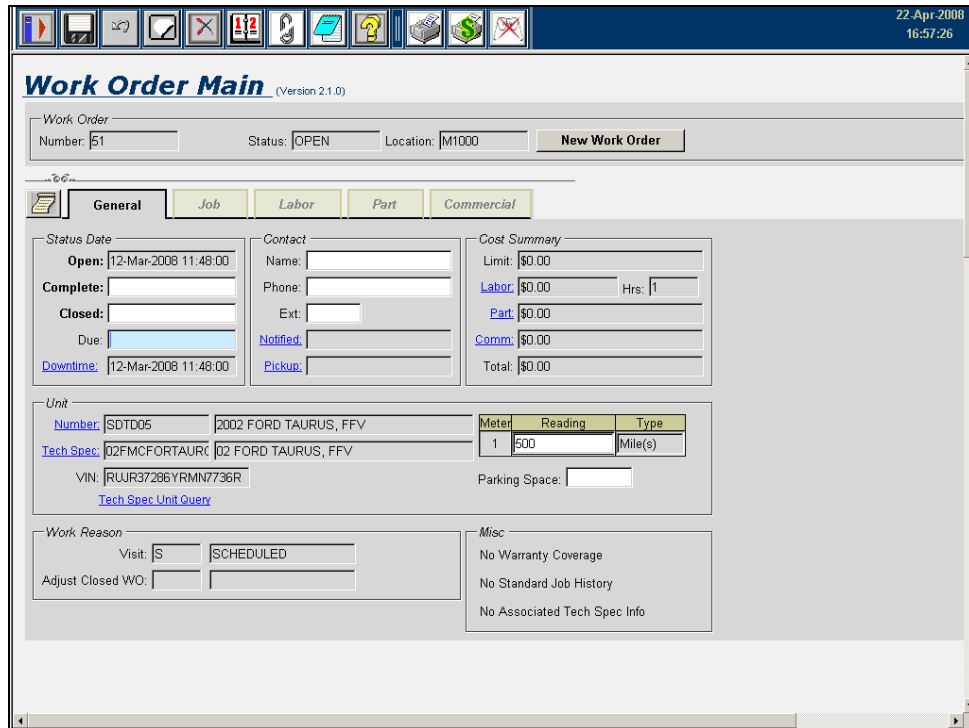
Step	Action
5.	Click the Search By list. 
6.	You can search by a work order, unit, component, or department. In this step, specify the option for which you want to search.
7.	You can only open previously created work orders.
8.	Double-click in the Work Order Number field to view the list of values page of existing work orders. 




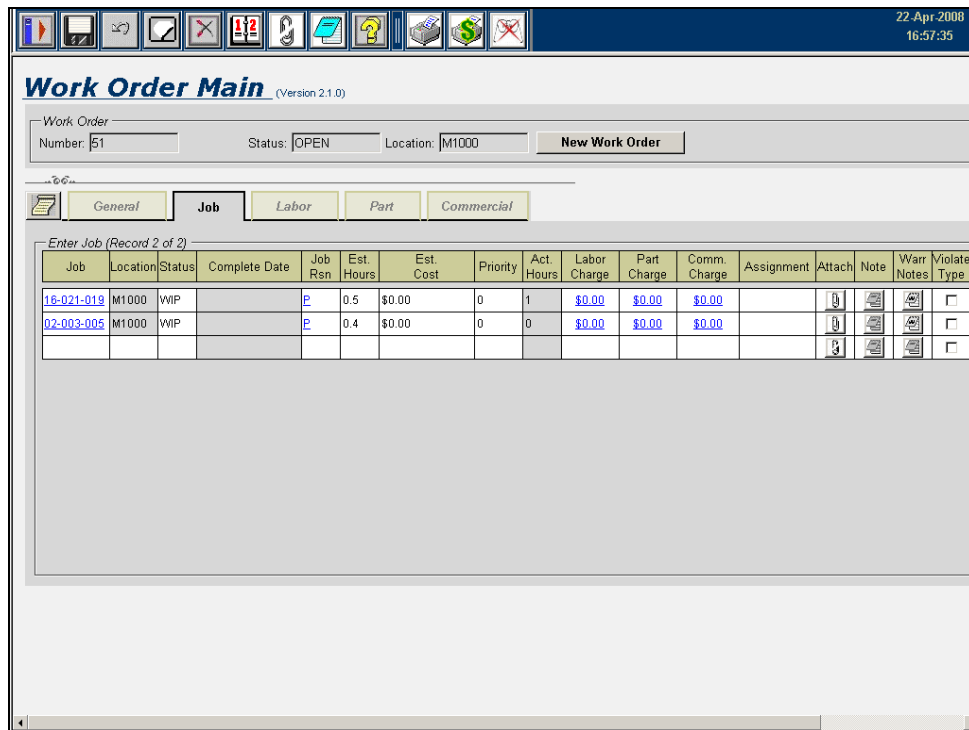
Step	Action
9.	To view additional search criteria necessary to filter your search results, you can click on the More button.
10.	Click the More button. 
11.	Click the WO Status list. 
12.	Click the Open list item. 
13.	Click the Search button. 



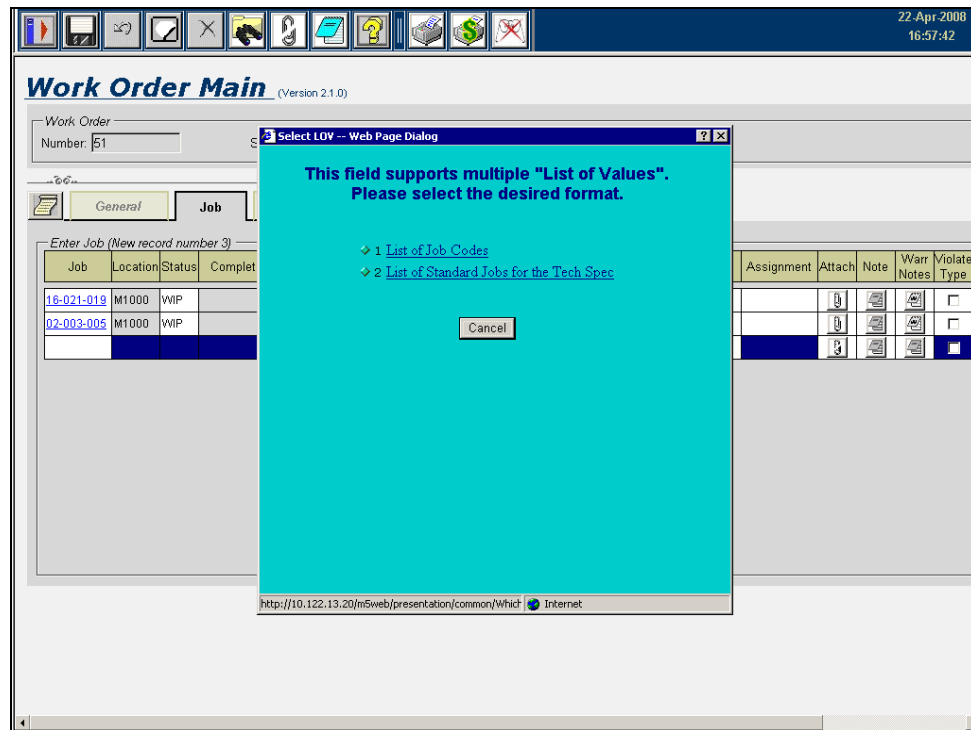
Step	Action
14.	The system returns only work orders with an "Open" status.
15.	Double-click in the Work Order No field. 51



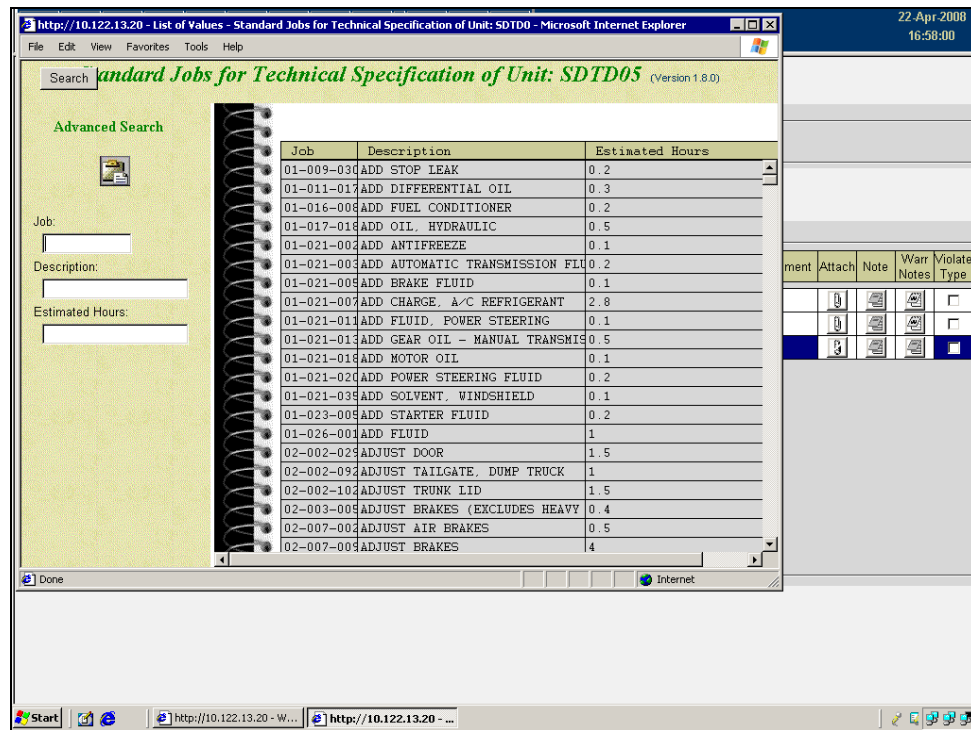
Step	Action
16.	After you select the work order number, all of the previously entered work order information will display on the General tab for you to view.
17.	<p>The General tab displays:</p> <ul style="list-style-type: none"> • The date the work order was originally open • Incurred charges • Current meter reading • Basic unit information
18.	<p>Click the Job tab to begin the process of adding a job to this work order.</p> 



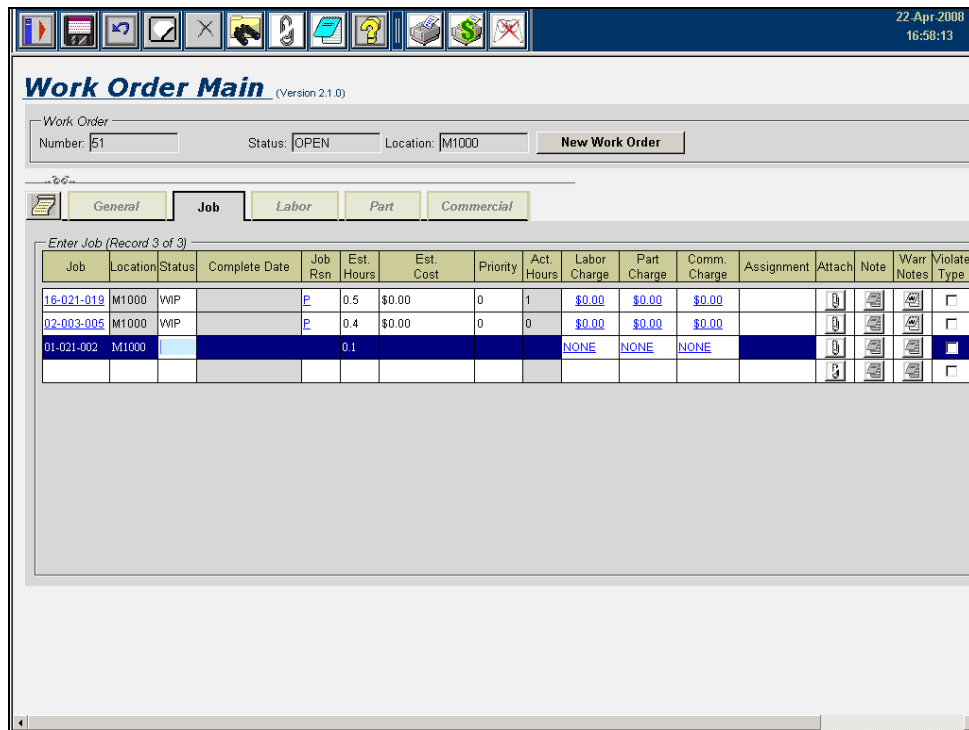
Step	Action
19.	<p>Notice that there are two existing jobs linked to this work order.</p> <p>To add a new job to this work order, click in the next available Job row.</p>
20.	<p>Double-click in the Job field to select the job you want to add.</p> <div style="border: 1px solid black; width: 60px; height: 15px; margin-top: 5px;"></div>



Step	Action
21.	<p>The following message prompts you to choose between two display options:</p> <ul style="list-style-type: none"> • Option 1 brings up a list of values page of all available job codes in the system. • Option 2 brings up a list of values page of only those jobs that are assigned to this unit's tech spec.
22.	<p>Click the List of Standard Jobs for the Tech Spec link.</p> <p>List of Standard Jobs for the Tech Spec</p>



Step	Action
23.	All pre-defined jobs for the tech spec assigned to this unit display. Select the job that reflects the work to be performed.
24.	Double-click in the Job field to add this job to the work order. 01-021-00



Work Order Main (Version 2.1.0)

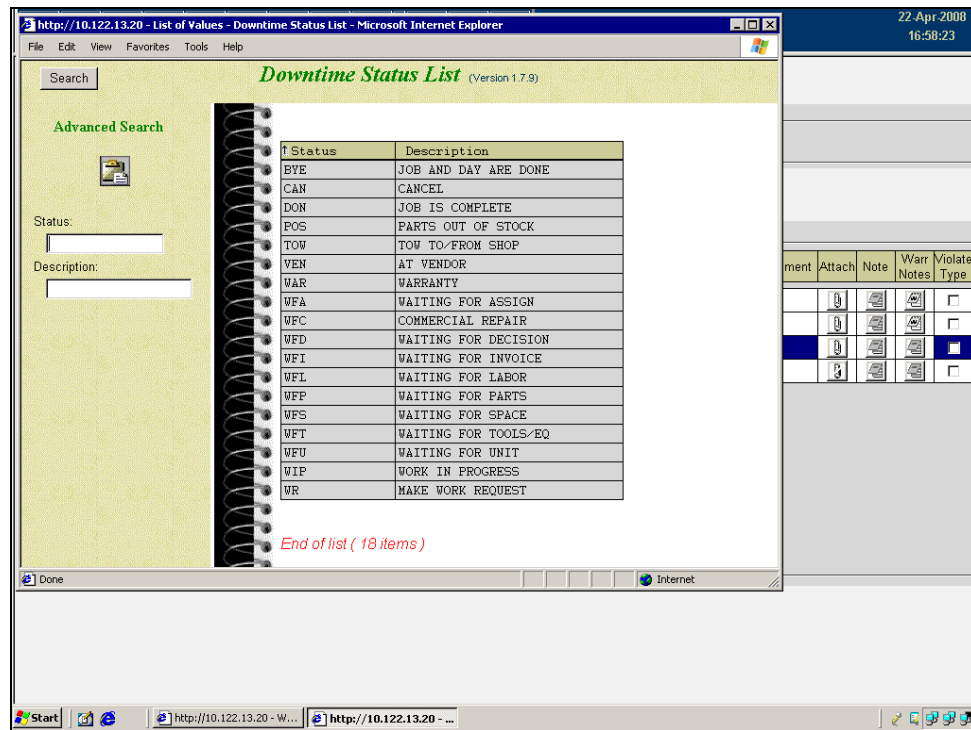
Work Order
Number: 51 Status: OPEN Location: M1000 [New Work Order](#)

General Job Labor Part Commercial

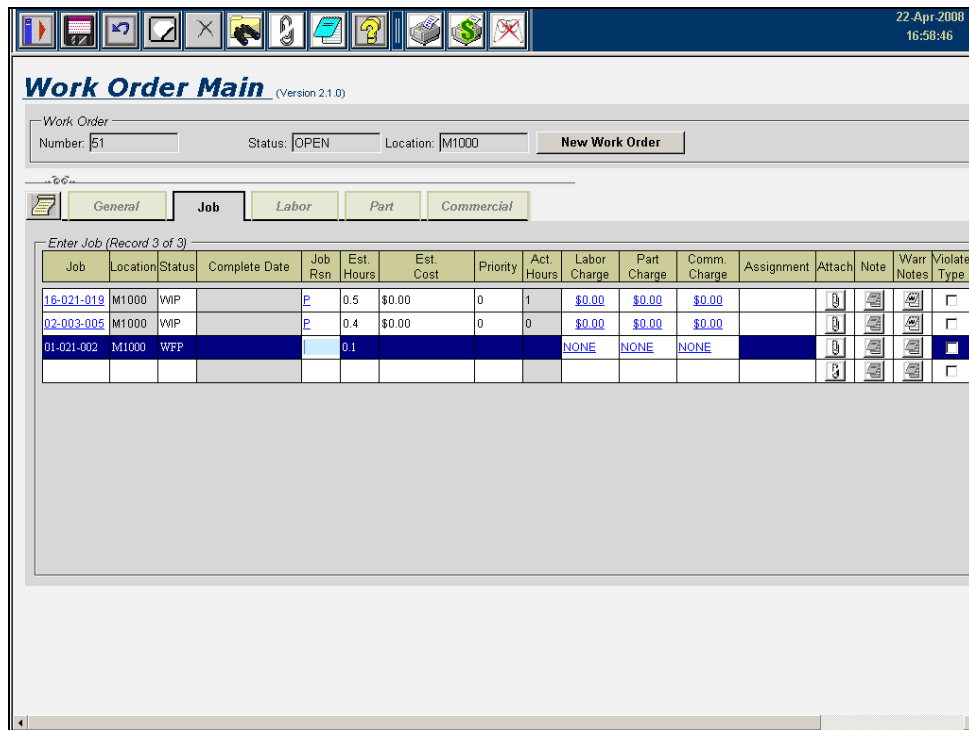
Enter Job (Record 3 of 3)

Job	Location	Status	Complete Date	Job Rsn	Est. Hours	Est. Cost	Priority	Act. Hours	Labor Charge	Part Charge	Comm. Charge	Assignment	Attach	Note	Warr Notes	Violate Type
16-021-019	M1000	WIP		P	0.5	\$0.00	0	1	\$0.00	\$0.00	\$0.00					
02-003-005	M1000	WIP		P	0.4	\$0.00	0	0	\$0.00	\$0.00	\$0.00					
01-021-002	M1000				0.1				NONE	NONE	NONE					

Step	Action
25.	Every job on a work order must be assigned a downtime status to show where the unit is in the maintenance process.
26.	Double-click in the Status field to view the list of values page of all valid downtime statuses. <div></div>



Step	Action
27.	Double-click in the Status field to apply this downtime status to the job. WFP




Work Order Main (Version 2.1.0)

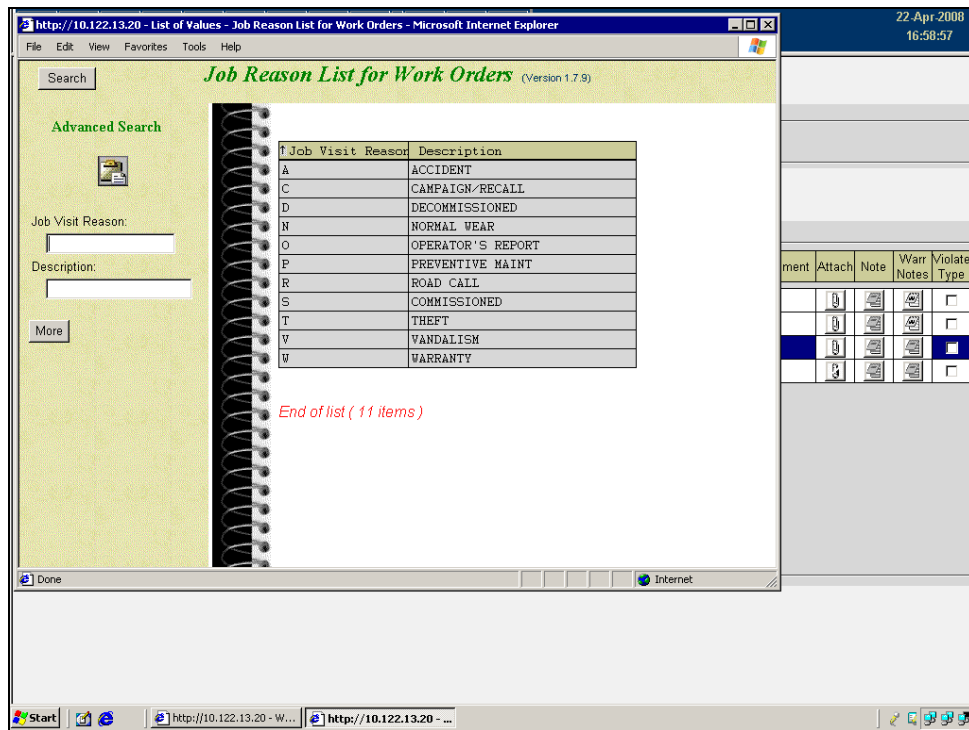
Work Order
Number: 51 Status: OPEN Location: M1000 **New Work Order**

General **Job** Labor Part Commercial

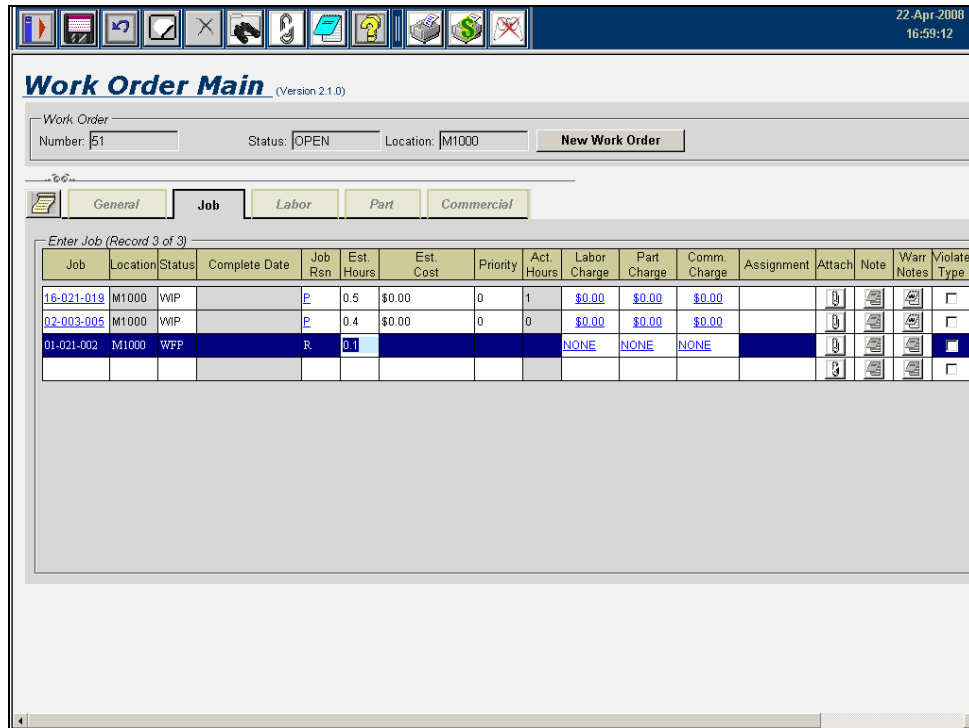
Enter Job (Record 3 of 3)

Job	Location	Status	Complete Date	Job Rsn	Est. Hours	Est. Cost	Priority	Act. Hours	Labor Charge	Part Charge	Comm. Charge	Assignment	Attach	Note	Warr Notes	Violate Type
16-021-019	M1000	WIP		P	0.5	\$0.00	0	1	\$0.00	\$0.00	\$0.00					
02-003-005	M1000	WIP		P	0.4	\$0.00	0	0	\$0.00	\$0.00	\$0.00					
01-021-002	M1000	WFP		P	0.1	\$0.00	0	0	NONE	NONE	NONE					

Step	Action
28.	Double-click in the Job Rsn field to view the list of values page of valid job reasons. 



Step	Action
29.	A Job Visit Reason explains why work is being performed on the unit.
30.	Double-click in the Job Visit Reason field to apply this reason to the job. R




Work Order Main (Version 2.1.0)

Work Order
Number: 51 Status: OPEN Location: M1000 [New Work Order](#)

General Job Labor Part Commercial

Enter Job (Record 3 of 3)

Job	Location	Status	Complete Date	Job Rsn	Est. Hours	Est. Cost	Priority	Act. Hours	Labor Charge	Part Charge	Comm. Charge	Assignment	Attach	Note	Warr Notes	Violate Type
16-021-019	M1000	WIP		P	0.5	\$0.00	0	1	\$0.00	\$0.00	\$0.00					
02-003-005	M1000	WIP		P	0.4	\$0.00	0	0	\$0.00	\$0.00	\$0.00					
01-021-002	M1000	WFP		R	0.1				NONE	NONE	NONE					

Step	Action
31.	The Estimated Hours default in for standard jobs. All jobs must have estimated hours entered. This value is an estimation of the number of hours expected to complete the work.
32.	Click the Save button to add this job to the work order. 
33.	Congratulations! You now know how to add a job to an open work order. End of Procedure.

Adding Notes to a Work Order

You can add notes to an existing work order when you want to include additional information for a job or to the work order itself.

To add notes to a work order, complete the following steps:

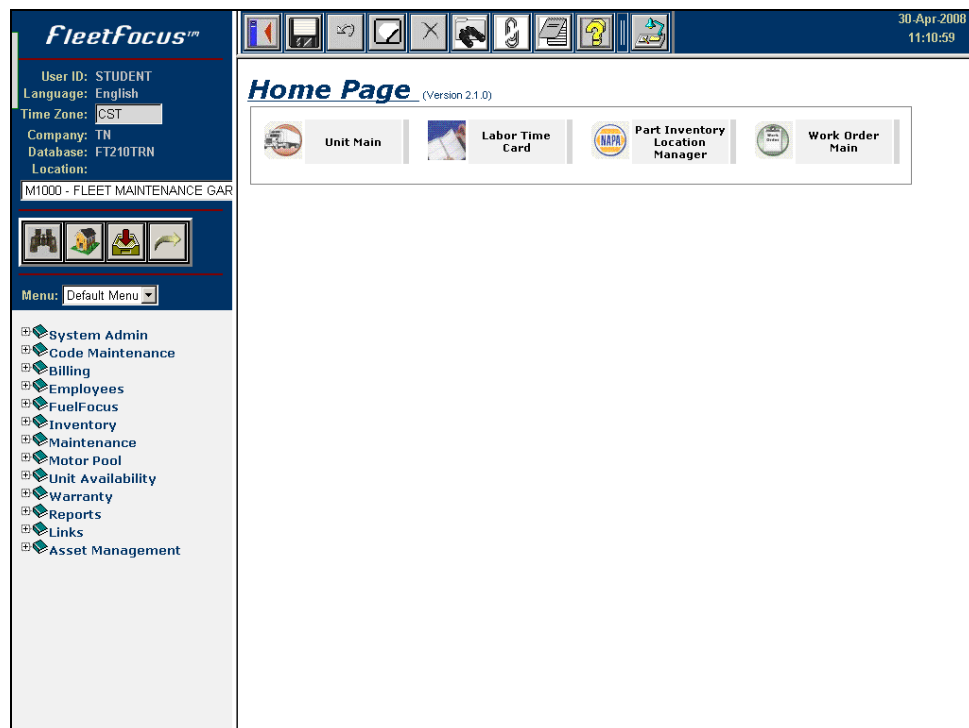
1. Navigate **Work Order Processing** screen.
2. Search for and access the work order for which you want to add notes.
3. At the **Work Order Main** screen, navigate to the **Job** tab.
4. Click **Note** icon to access the **Work Order Note Editor** screen.
5. Enter the notes.



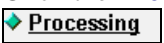

6. Save the record.

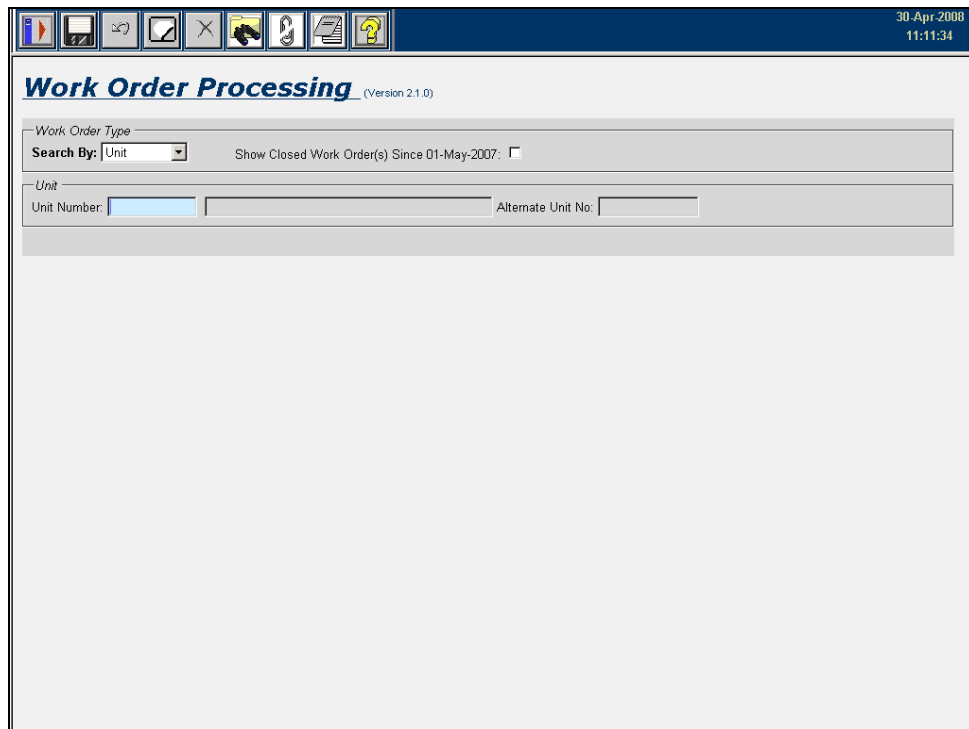
Procedure

In this topic, you learn how to add a note to an existing work order.


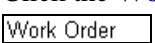
Step	Action
1.	<p>To add notes to a work order, complete the following steps:</p> <ol style="list-style-type: none"> 1. Navigate Work Order Processing screen. 2. Search for and access the work order for which you want to add notes. 3. At the Work Order Main screen, navigate to the Job tab. 4. Click Note icon to access the Work Order Note Editor screen. 5. Enter the notes. 6. Save the record.
2.	<p>Begin the process of adding a note to a work order by navigating to the Work Order Processing screen.</p>




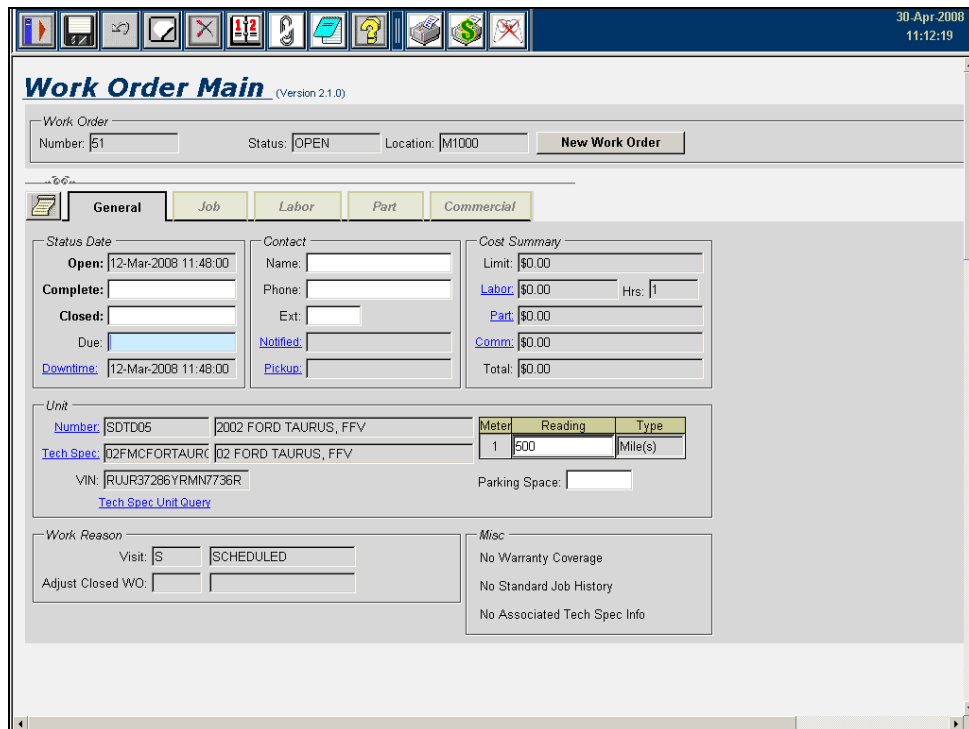
Step	Action
3.	Click the Maintenance button. 
4.	Click the Work Order button. 
5.	Click the Processing link. 
6.	Click the Hide Menu button. 
7.	You are now at the Work Order Processing screen. At this screen, search for work order 51.



The screenshot shows the 'Work Order Processing' application window. The title bar includes standard window controls and a status bar showing '30-Apr-2008 11:11:34'. The main window has a title 'Work Order Processing (Version 2.1.0)'. Below the title, there is a 'Work Order Type' section with a 'Search By:' dropdown menu set to 'Unit'. To the right of this is a checkbox labeled 'Show Closed Work Order(s) Since 01-May-2007:'. Below this is a 'Unit' section with a 'Unit Number:' text box, a separator, and an 'Alternate Unit No.' text box. The main content area is currently empty.


Step	Action
8.	Click the Search By list. 
9.	Click the Work Order list item. 

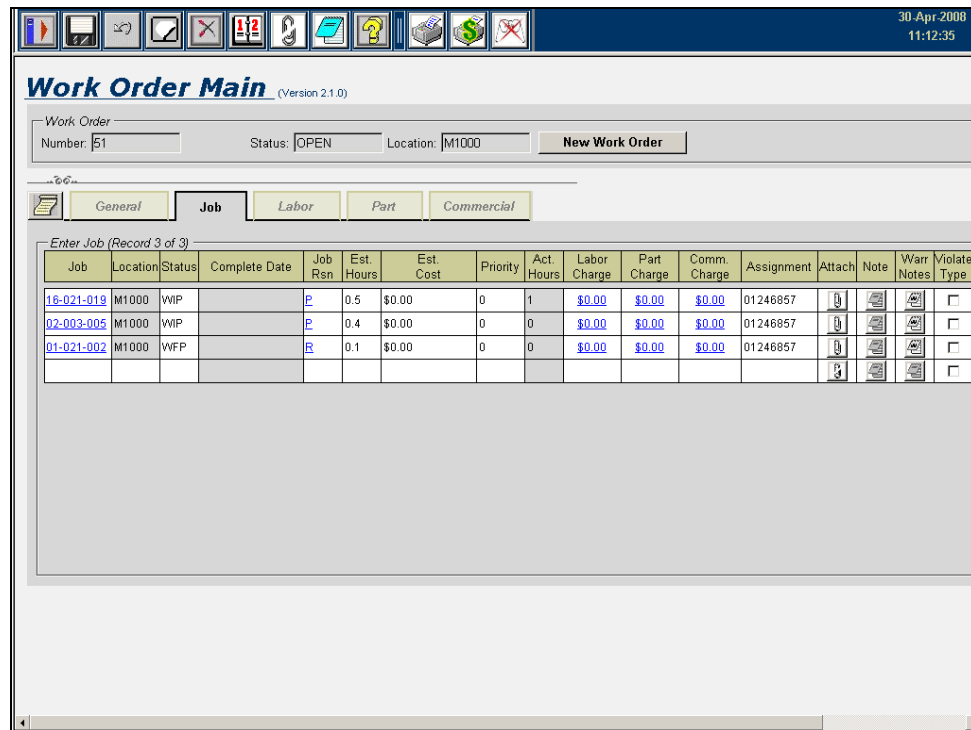
Step	Action
10.	Click in the Work Order Number field. 
11.	Enter the desired information into the Work Order Number field. Enter " 51 ".
12.	Press [Tab] .
13.	You are now at the Work Order Main screen. To add notes to a job related to the work order, navigate to the Job tab.



The screenshot shows the 'Work Order Main' screen (Version 2.1.0). At the top, there is a toolbar with various icons and a status bar showing '30-Apr-2008 11:12:19'. The main form area is titled 'Work Order Main' and contains several sections:

- Work Order**: Number: 51, Status: OPEN, Location: M1000. A 'New Work Order' button is present.
- General** tab is selected. It includes:
 - Status Date**: Open: 12-Mar-2008 11:48:00, Complete: (empty), Closed: (empty), Due: (empty), Downtime: 12-Mar-2008 11:48:00.
 - Contact**: Name: (empty), Phone: (empty), Ext: (empty), Notified: (empty), Pickup: (empty).
 - Cost Summary**: Limit: \$0.00, Labor: \$0.00 Hrs: 1, Part: \$0.00, Comm: \$0.00, Total: \$0.00.
- Unit**: Number: SDTD05, 2002 FORD TAURUS, FFV. Meter: 1, Reading: 500, Type: Mile(s). Tech Spec: 02FMCFORTAUR(02 FORD TAURUS, FFV. VIN: RUJR37266YRMN7736R. Parking Space: (empty).
- Work Reason**: Visit: S, SCHEDULED. Adjust Closed WO: (empty).
- Misc**: No Warranty Coverage, No Standard Job History, No Associated Tech Spec Info.

Step	Action
14.	Click the Job object. 
15.	Notice that there are three jobs attached to this work order. Locate the row with the job to which you want to add notes.





Work Order Main (Version 2.1.0)

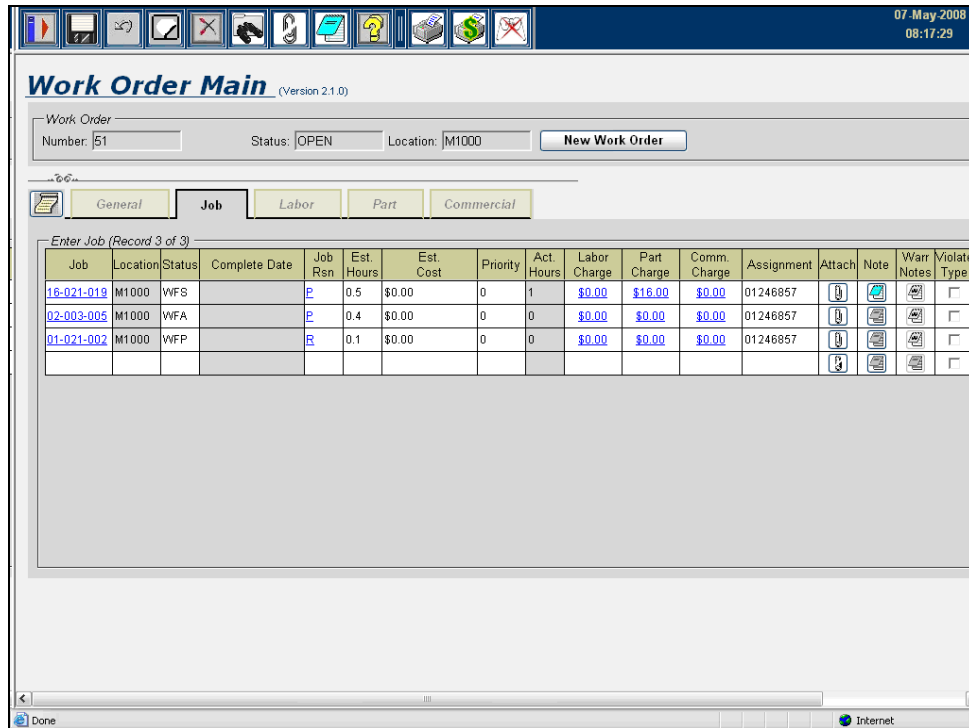
Work Order
Number: 51 Status: OPEN Location: M1000 [New Work Order](#)

General **Job** Labor Part Commercial

Enter Job (Record 3 of 3)

Job	Location	Status	Complete Date	Job Rsn	Est. Hours	Est. Cost	Priority	Act. Hours	Labor Charge	Part Charge	Comm. Charge	Assignment	Attach	Note	Warr Notes	Violate Type
16-021-019	M1000	WIP		P	0.5	\$0.00	0	1	\$0.00	\$0.00	\$0.00	01246857				<input type="checkbox"/>
02-003-005	M1000	WIP		P	0.4	\$0.00	0	0	\$0.00	\$0.00	\$0.00	01246857				<input type="checkbox"/>
01-021-002	M1000	WIP		R	0.1	\$0.00	0	0	\$0.00	\$0.00	\$0.00	01246857				<input type="checkbox"/>

Step	Action
16.	Click the Note button. 
17.	You are now at the Work Order Note Editor screen for work order 51. Enter notes related to the job in the free-form edit field.
18.	This is an example of a note.
19.	You can also enter other notes for the same job.
20.	Click the X to return to close the screen and to return to the Work Order Main frame. 



Step	Action
21.	Congratulations! You now know how to add a note to an existing work order. End of Procedure.

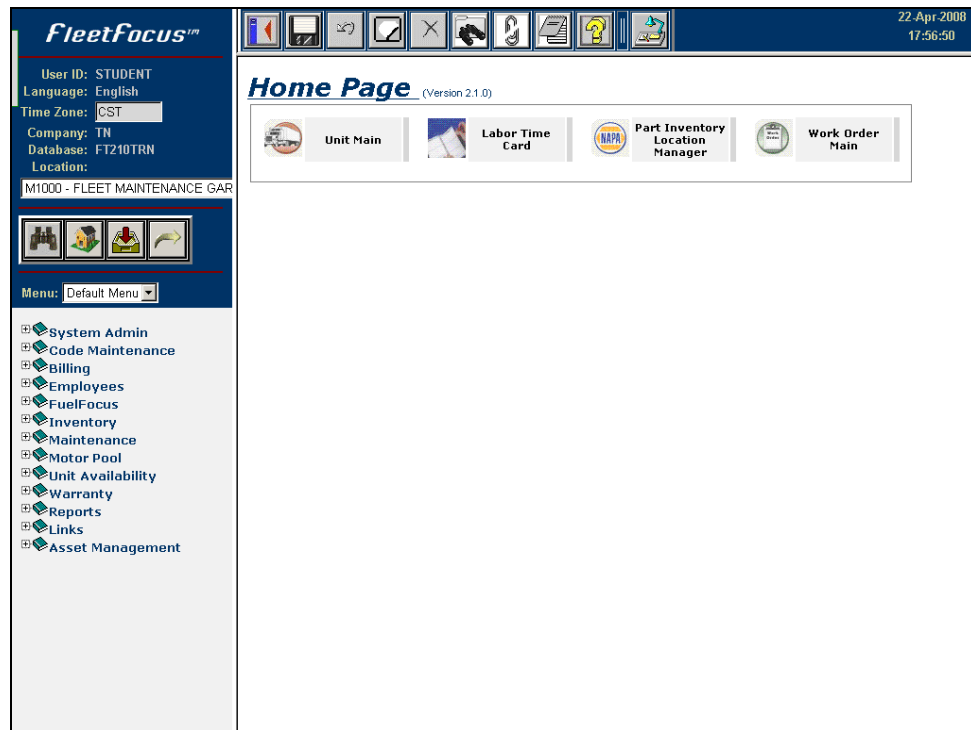
Printing a Work Order





After a work order has been created and jobs have been added, the work order can be printed if needed.

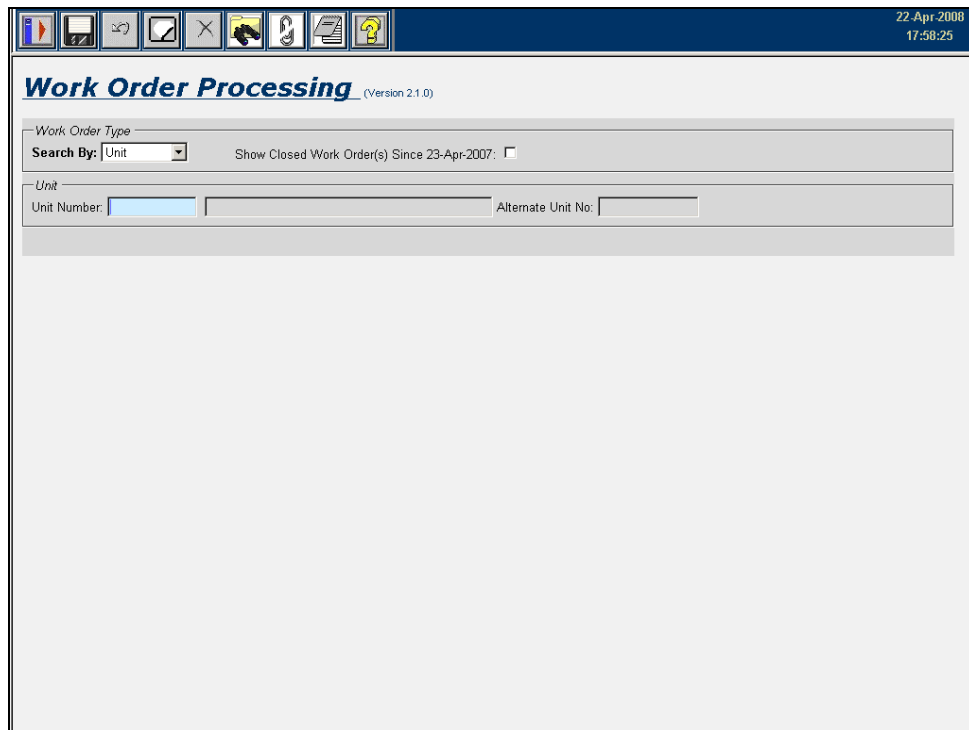
Typically, you will print out the work order after a job is added and the mechanic is going to perform the work. For the purposes of this topic, you will learn how to navigate from the Home Page.


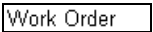
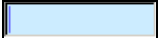
Procedure

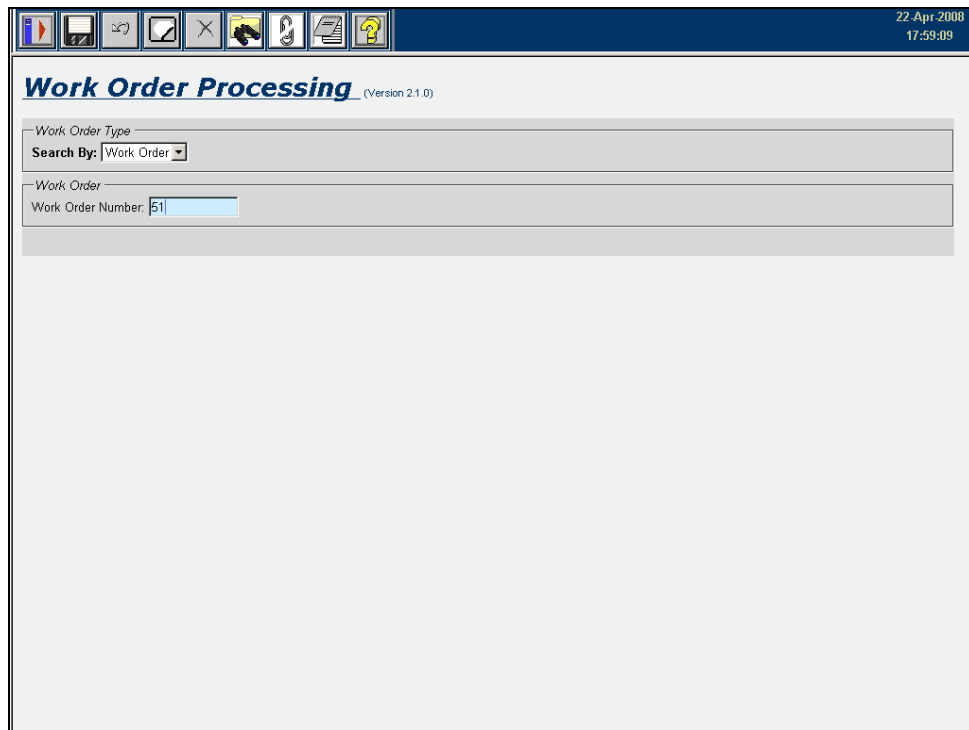
In this topic, you learn how to print a work order.



Step	Action
1.	Click the Maintenance button. 
2.	Click the Work Order button. 
3.	Click the Processing link. 
4.	Click the Hide Menu button to view the entire screen. 



Step	Action
5.	Click the Search By list. 
6.	Click the Work Order list item. 
7.	Click in the Work Order Number field. 
8.	Use the work order number 51 . This is the work order to which you previously added a job.
9.	Enter the desired information into the Work Order Number field. Enter " 51 ".



Work Order Processing (Version 2.1.0)

22 Apr 2008 17:59:09

Work Order Type

Search By: Work Order

Work Order

Work Order Number: 51

Step	Action
10.	Press [Tab] to proceed to the Work Order Main frame.

Work Order Main (Version 2.1.0)

Work Order Number: Status: Location: [New Work Order](#)

[To Go](#)

General [Job](#) [Labor](#) [Part](#) [Commercial](#)

Status Date
Open:
Complete:
Closed:
Due:
Downtime:


Contact
Name:
Phone:
Ext:
Notified:
Pickup:

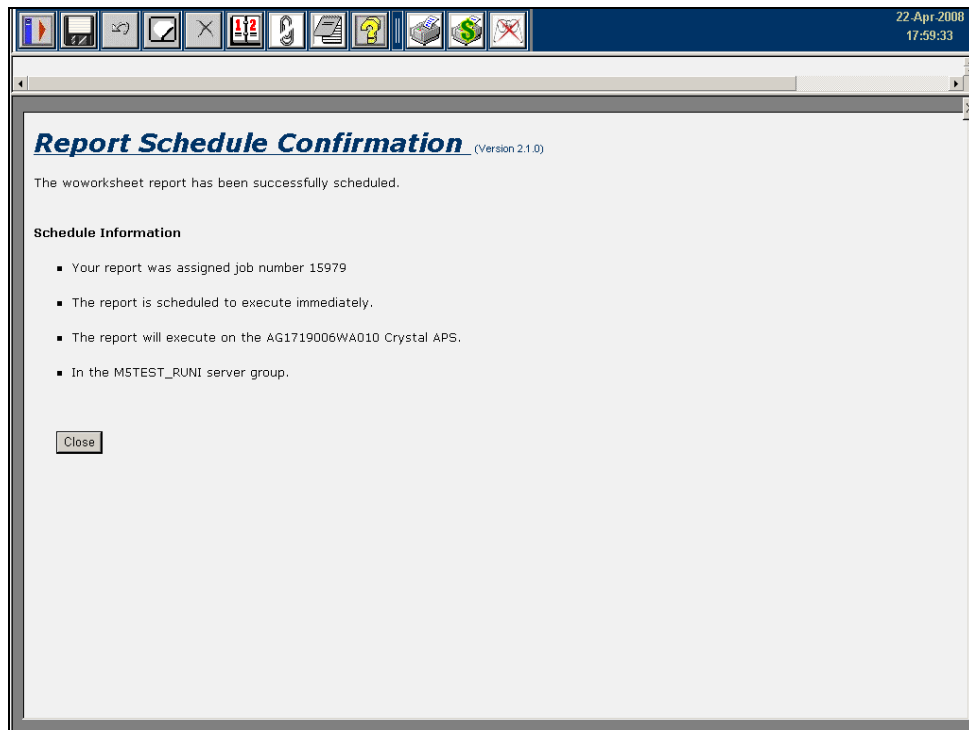
Cost Summary
Limit:
Labor: **Hrs:**
Part:
Comm:
Total:


Unit
Number: **Meter** **Reading** **Type**
Tech Spec:
VIN: **Parking Space:**
[Tech Spec Unit Query](#)

Work Reason
Visit:
Adjust Closed WO:

Misc
 No Warranty Coverage
 No Standard Job History
 No Associated Tech Spec Info

Step	Action
11.	Click the Print icon to print the work order. 



Step	Action
12.	<p>The Report Schedule Confirmation screen indicates the following:</p> <ul style="list-style-type: none"> • The system assigned a job number to your work order. • The work order is now in the print queue and will print soon.
13.	<p>Click the Close button to preview the printed work order.</p> 

http://10.122.13.20/CE_BIN/mStest/U-STUDENT/RunImmediate/CE-STUDENT-15985-woworksheet.pdf - Microsoft Internet Explorer

Save a Copy Search Select 75%

Work Order Job Worksheet STATE OF TENNESSEE
Report Printed: 22-Apr-2008 18:57:41 By User: STUDENT

Work Order: 000051 Unit No: S6MH51

WO Location: 1024 GARAGE OPERATIONS - KNOXVILLE Total Job Count: 1
WO Reason: SCHEDULED Unit Description: 2005 FREIGHTLIN M2106V
Date Opened: 18-Feb-2008 15:47:52 By: STACKETT Alt. Unit No: License No:
WO Status: Open User Status: A Serial No: 1FVAC3DASHR35245
Promised Date: When Picked: Tech Spec: 05FREEMC10D MCC: TRUCKIN7
Meter 1: M 26.327 Life Use 1: 26.327 Using Dept: Dist 14 Motor - Anderson Co
Meter 2: N 0 Life Use 2: 0 In-Service Date: 13-Apr-2005
Contract: Contract No:

Work Order Instructions / Comments:

20-008-007 -
REPAIR LINKAGE, CLUTCH (HEAVY EQUIPMENT)

Job Reason: PREVENTIVE MAINT Job Location: 1024 GARAGE OPERATIONS - KNOXVILLE
Job ID: 358 Opened Date: 18-Feb-2008 Status: WIP
Work Req No: Due Date: 07-Mar-2008 Est. Job Cost: -
Campaign No: Scheduled: N Warranty: N Std. Labor Hrs: 0.0
Assigned To: Priority: 0 Shift: Est. Labor Hrs: 0.0

Job Instructions and Notes:

Part Number	Part Description	Quantity

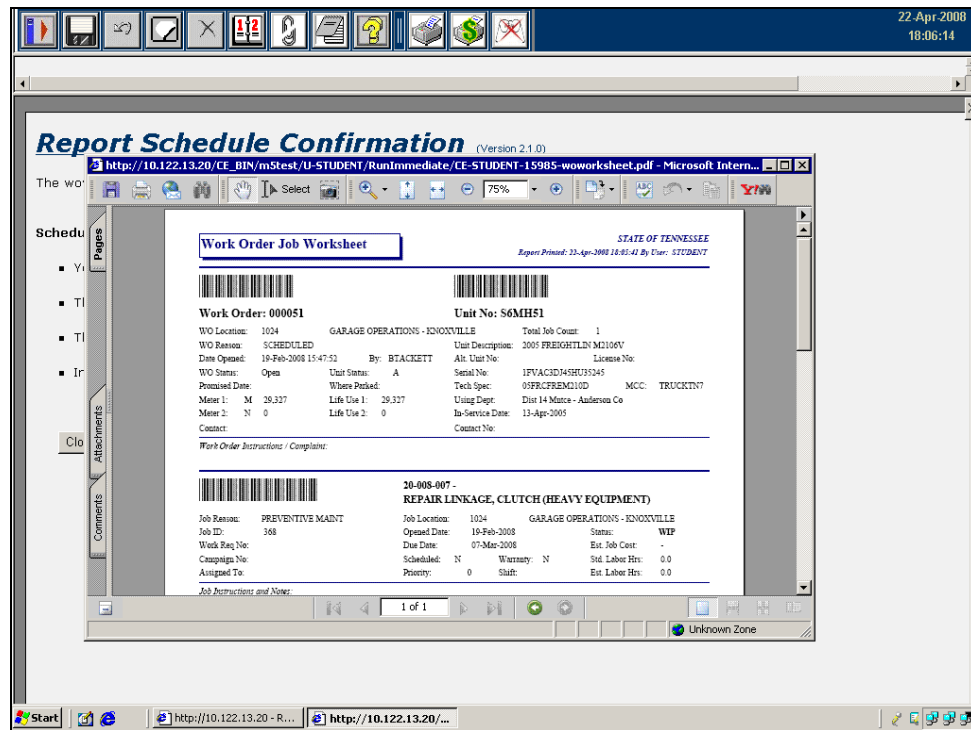
1 of 1


Done

Start http://10.122.13.20 - R... http://10.122.13.20/...

Unknown Zone

Step	Action
14.	<p>This is the print preview of the work order.</p> <p>Although the State of Tennessee is not utilizing bar code scanning functionality at this time, if your organization decides to use this in the future, you can scan these bar codes to input the applicable information into the M5 system.</p>



Step	Action
15.	Click the Close button. 
16.	Congratulations! You now know how to print a work order. End of Procedure.

Labor Charges

The **Labor Time Card** screen is a central location for garage personnel to record time for a working day. Use this screen to enter time spent:

- Working on jobs in the garage (direct time)
- Attending meetings (indirect time)
- Taking leave (indirect time)

Entered time is referred to as **labor charges** in the M5 system.

Your supervisor will approve all entered labor charges prior to final processing for payroll. After approvals, these charges will then be interfaced to PeopleSoft for payroll processing.

Note: It is important that you enter your labor charges accurately. This information is reflected in your paycheck.

In this lesson, you learn how to complete the following tasks:

- Enter time on the Labor Time Card (for work orders & indirect accounts)
- Correct hours
- Delete a labor entry

Enter Time in Labor Time Card (Work Order)

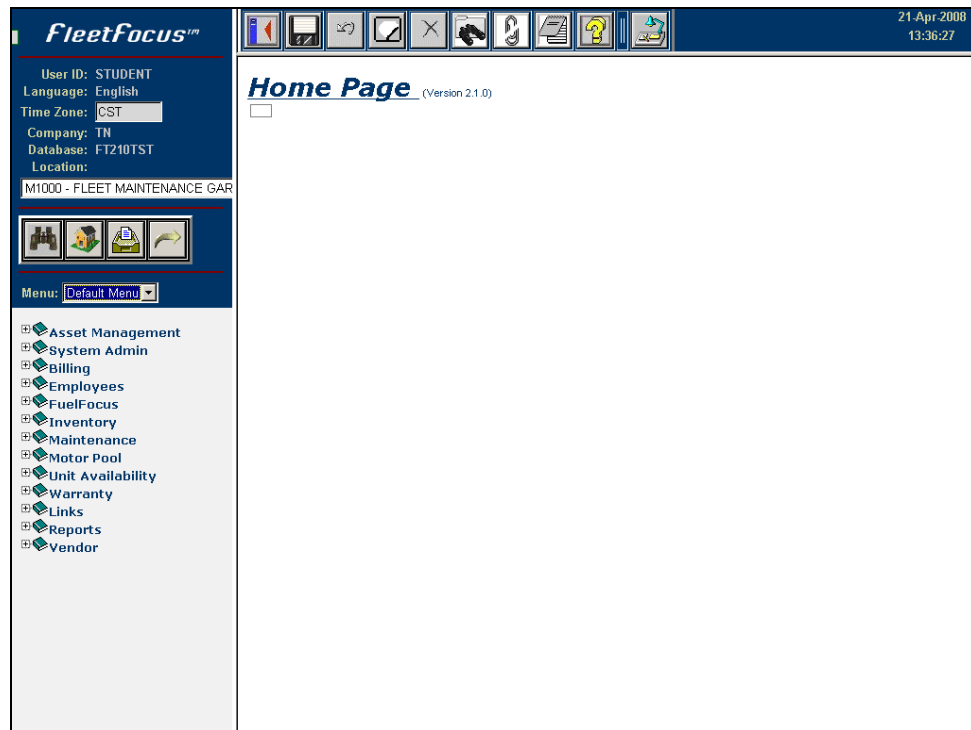
Labor charges can be entered for either a work order or an indirect account in the M5 system.

In this topic, you learn how to charge time to a specific work order and a specific job within that work order.

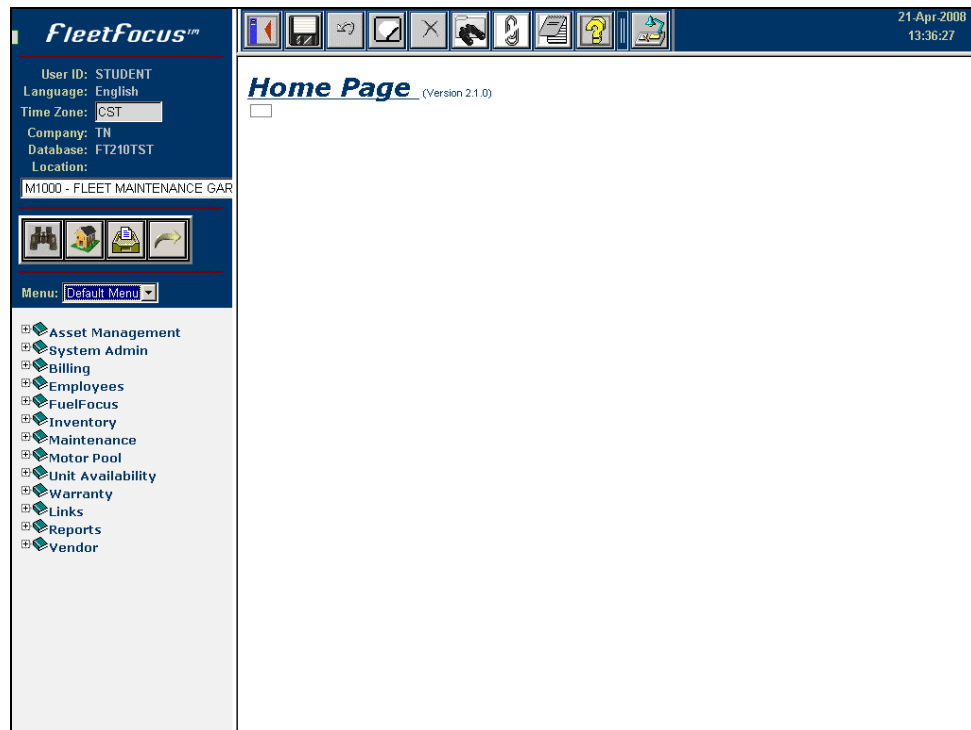
More than one employee can record time to the same job on the same work order.




Procedure

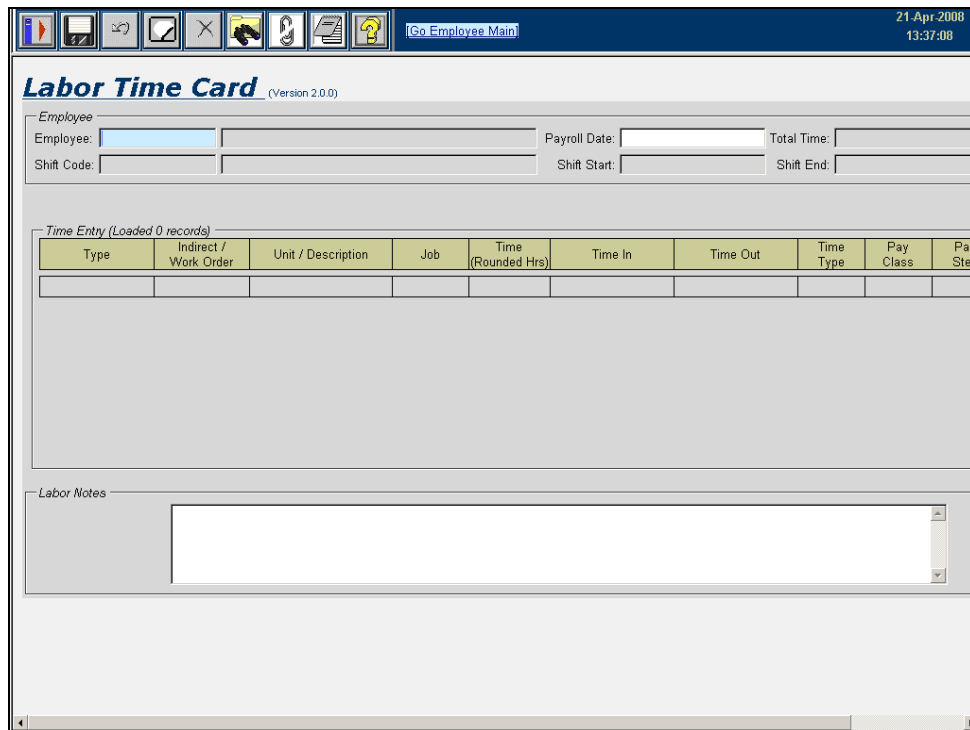
In this topic, you learn how to enter time into the labor time card for a work order.




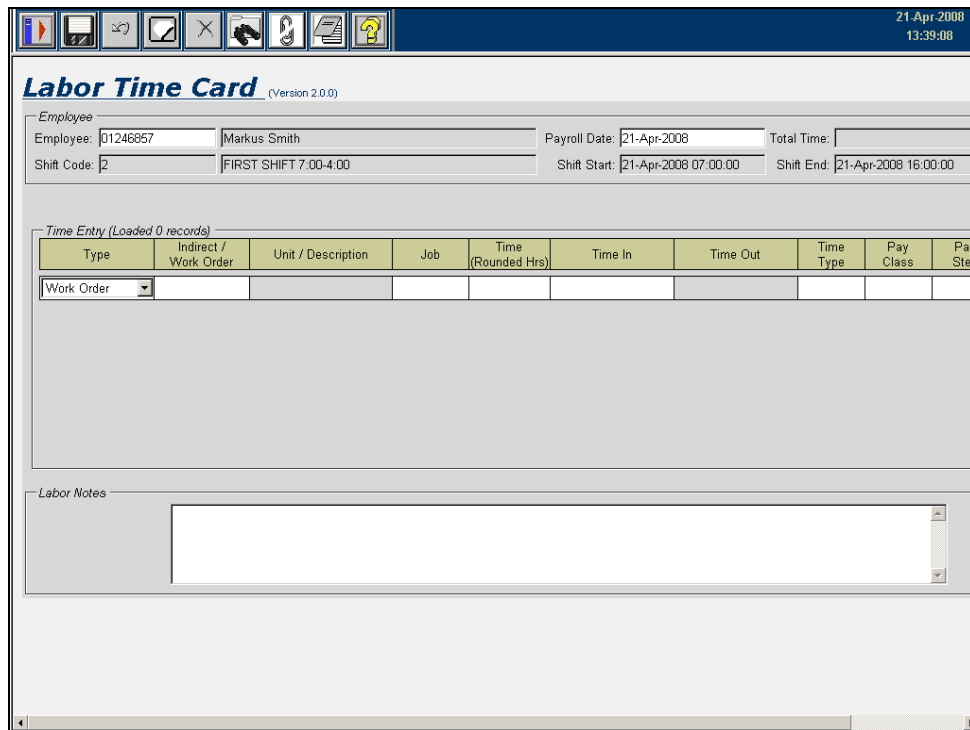
Step	Action
1.	<p>All mechanics are required by the State of Tennessee to use the Labor Time Card to input their working time in the M5 system.</p> <p>The time you enter will then be sent to PeopleSoft where this information will be reflected on your paycheck after it has been approved by your supervisor.</p> <p>Note: Your entered time must reflect your 37.5 hour week.</p>




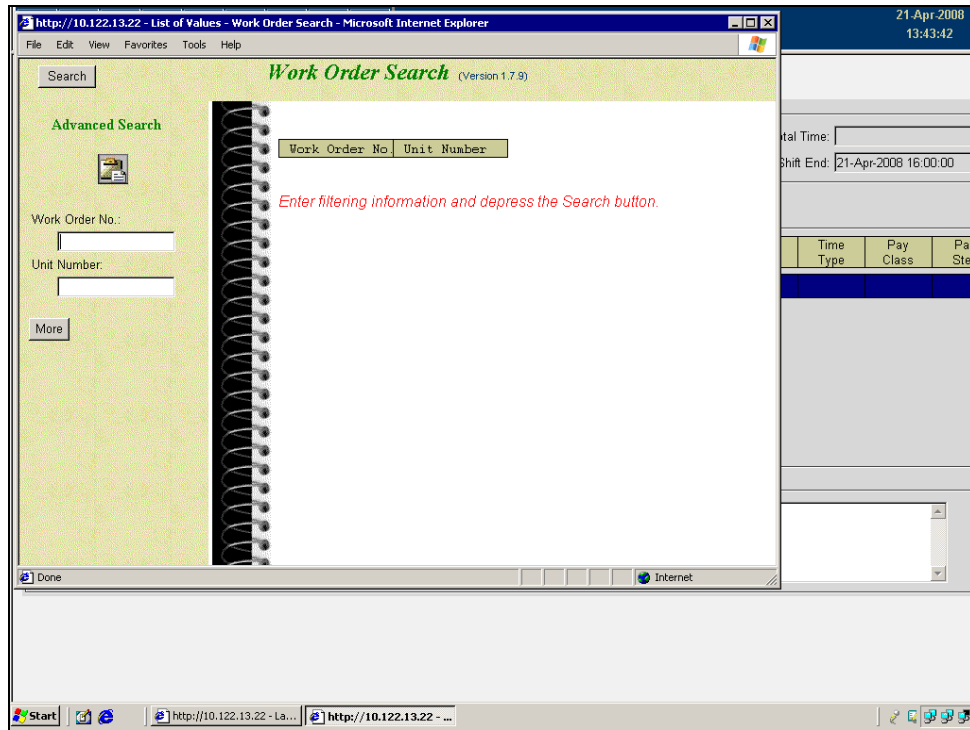
Step	Action
2.	Click the Maintenance button.  Maintenance
3.	Click the Labor Capture button.  Labor Capture
4.	Click the Labor Time Card link. Labor Time Card
5.	Click the Hide Menu button. 

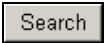



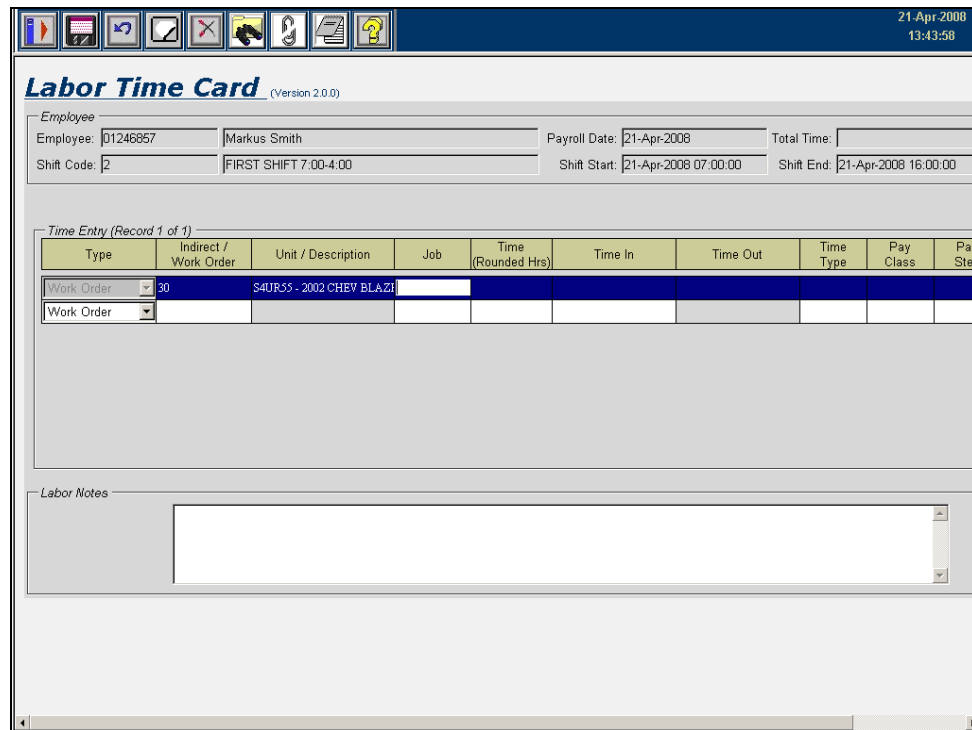
Step	Action
6.	Click in the Employee field. 
7.	Enter the desired information into the Employee field. Enter " 01246857 ".
8.	Press the [Tab] key twice to view the rows on the time card.
9.	Press [Tab] .
10.	The current date defaults into the Payroll Date field. You can change this date if necessary.
11.	Press [Tab] .
12.	Press [Tab] .



Step	Action
13.	<p>Once the labor entry rows have appeared, notice that the Shift Code and the Shift Start/End times populate.</p> <p>This information is based on what is entered on the Employee Main frame for the employee's daily working hours.</p>
14.	<p>Use the Type field to indicate what you are charging time to - either a Work Order or an Indirect Account.</p> <p>In this scenario, you are charging time to a work order.</p>
15.	Press [Tab] .
16.	<p>Double-click in the Indirect/Work Order field.</p> 



Step	Action
17.	Assume that you want to charge the time to work order 30.
18.	Click the Search button. 
19.	Double-click in the Work Order No field. 



Labor Time Card (Version 2.0.0)

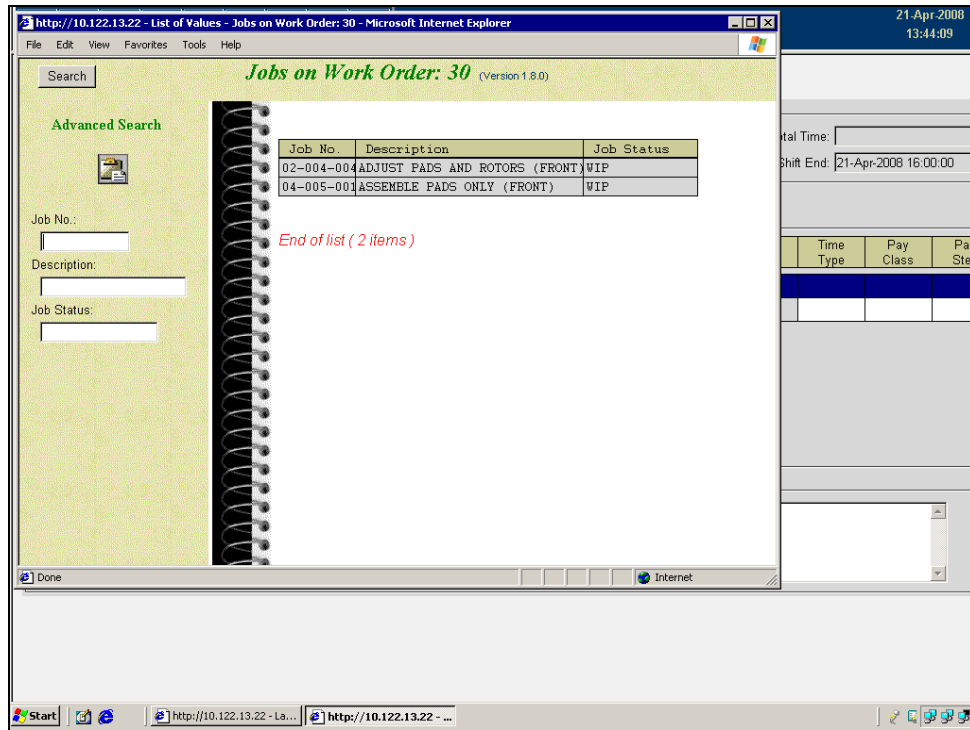
Employee: 01246857 Markus Smith Payroll Date: 21-Apr-2008 Total Time:
Shift Code: 2 FIRST SHIFT 7:00-4:00 Shift Start: 21-Apr-2008 07:00:00 Shift End: 21-Apr-2008 16:00:00

Time Entry (Record 1 of 1)

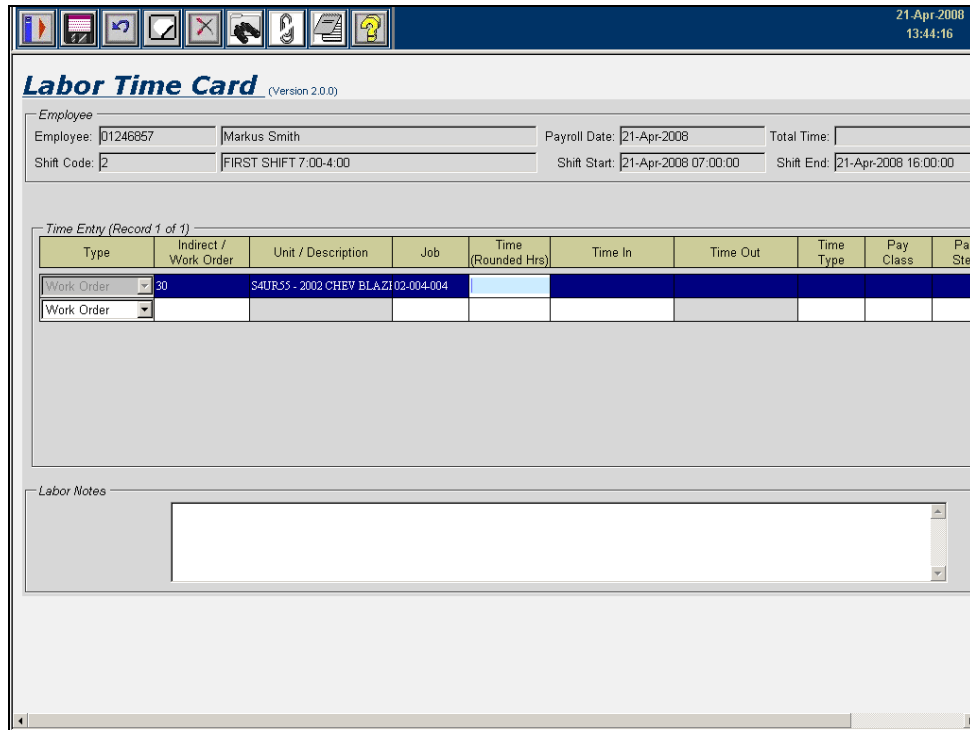
Type	Indirect / Work Order	Unit / Description	Job	Time (Rounded Hrs)	Time In	Time Out	Time Type	Pay Class	Pay Step
Work Order	30	S4UR55 - 2002 CHEV BLA							
Work Order									

Labor Notes

Step	Action
20.	Double-click in the Job field to view the List of Values page of all jobs attached to this work order. <input type="text"/>



Step	Action
21.	Double-click in the Job No field. 02-004-004



Labor Time Card (Version 2.0.0)

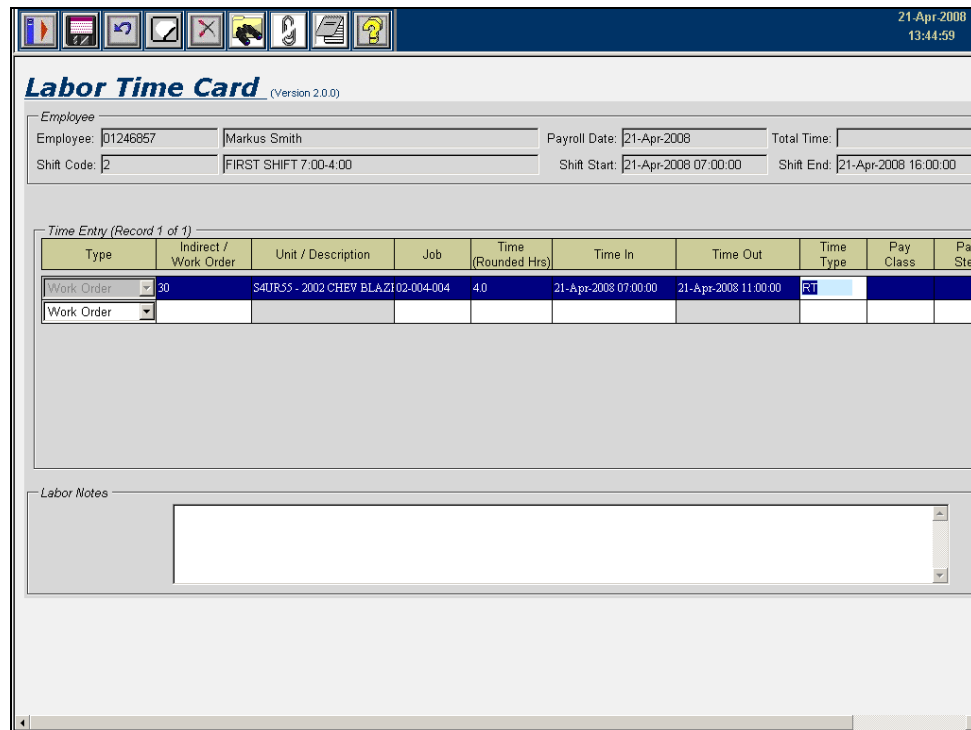
Employee: 01246857 Markus Smith Payroll Date: 21-Apr-2008 Total Time:
Shift Code: 2 FIRST SHIFT 7:00-4:00 Shift Start: 21-Apr-2008 07:00:00 Shift End: 21-Apr-2008 16:00:00


Time Entry (Record 1 of 1)

Type	Indirect / Work Order	Unit / Description	Job	Time (Rounded Hrs)	Time In	Time Out	Time Type	Pay Class	Pay Step
Work Order	30	S4UR55 - 2002 CHEV BLA Z102-004-004							
Work Order									

Labor Notes

Step	Action
22.	Enter the desired information into the field. Enter "4.0".
23.	Press [Tab] .
24.	Press [Tab] .



Step	Action
25.	Click the scrollbar.
26.	<p>The Time In field will default with the current date, and the time will default from the employee's defined shift start time on their employee record.</p> <p>You can change this information to reflect true dates and times the work was performed.</p>
27.	<p>The Time Out field populates with the current date and the system adds the worked hours to calculate the time the job was completed.</p> <p>For example, suppose the employee's shift started at 7 am. The employee worked 4 hours on this job. The system interprets this information and calculates the job ending at 11 a.m.</p>
28.	The Time Type field comes in from the Employee Main frame.
29.	Pay Class , Pay Step , and Union are not being used by the State of Tennessee.
30.	<p>Click the Save button.</p> 
31.	<p>Congratulations! You now know how to enter time into the labor time card for a work order.</p> <p>End of Procedure.</p>

Enter Time in Labor Time Card (Indirect Account)

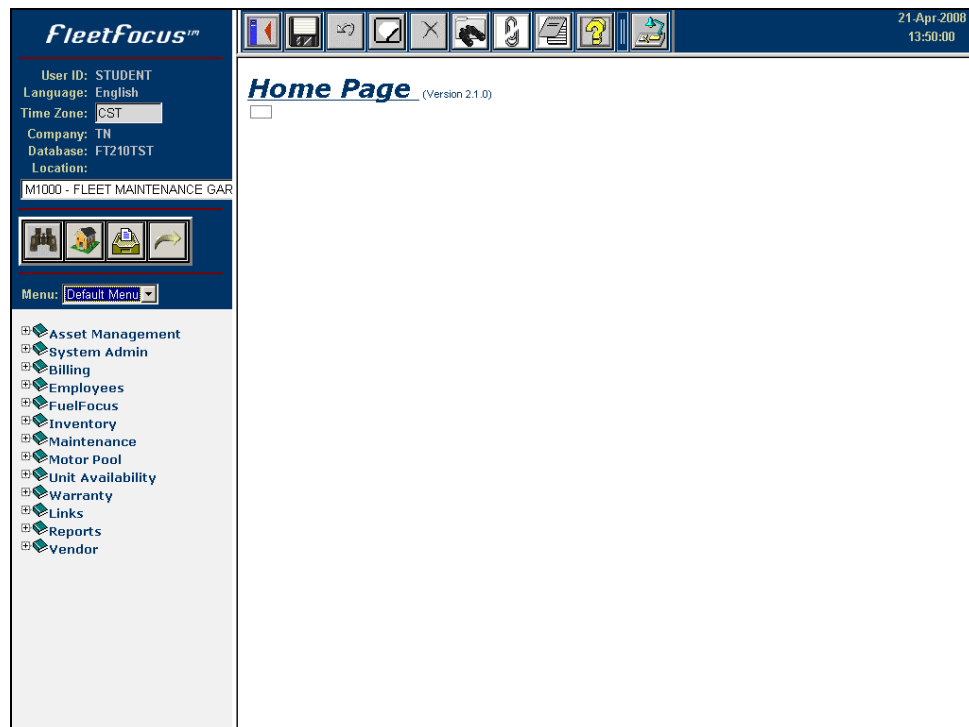
Labor charges can be applied to a work order or an indirect account. In the M5 system, an indirect account is used to record time spent on something other than a work order. This could be attending a safety meeting for a few hours, cleaning the shop after completed maintenance, or taking a day of sick leave.





Note: Any leave time you enter on the **Labor Time Card** screen is sent to PeopleSoft and is reflected on your paycheck and your leave balances.

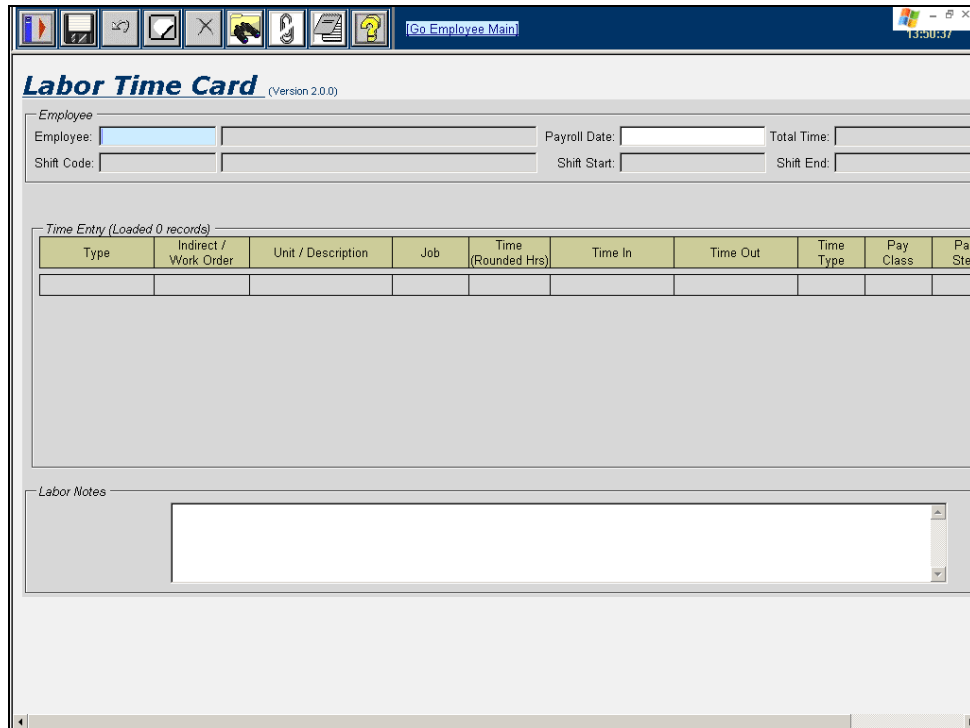
Procedure

In this topic, you learn how to enter time on the **Labor Time Card** frame for an indirect account.


Step	Action
1.	<p>To enter time on the Labor Time Card frame, complete the following steps:</p> <ol style="list-style-type: none"> 1. Navigate to the Labor Time Card screen. 2. Search for and select the employee for whom you want to record time. 3. Enter the payroll date. 4. Enter the time-related details. 5. Save the record.



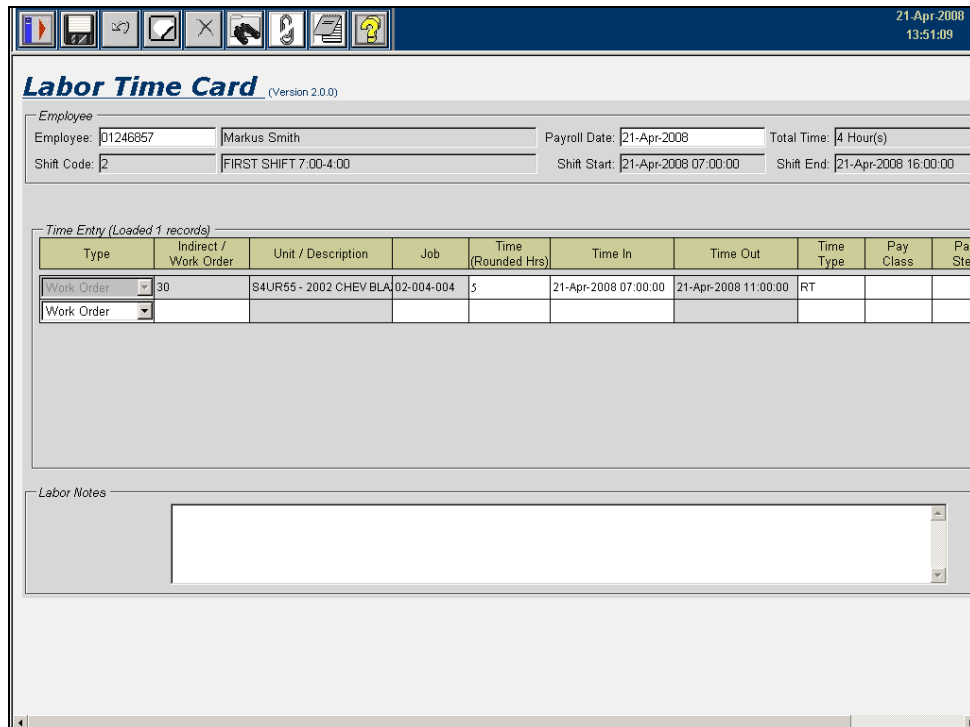
Step	Action
2.	Click the Maintenance link. 
3.	Click the Labor Capture link. 
4.	Click the Labor Time Card link. 
5.	Click the Hide Menu button. 



The screenshot shows the 'Labor Time Card' application window. At the top is a toolbar with various icons and a 'Go Employee Main' button. Below the toolbar, the title 'Labor Time Card (Version 2.0.0)' is displayed. The main form area contains several sections: an 'Employee' section with fields for Employee, Payroll Date, Total Time, Shift Code, Shift Start, and Shift End; a 'Time Entry (Loaded 0 records)' section with a table header including Type, Indirect / Work Order, Unit / Description, Job, Time (Rounded Hrs), Time In, Time Out, Time Type, Pay Class, and Pay Step; and a 'Labor Notes' section with a text area for notes.

Step	Action
6.	Click in the Employee field. 
7.	Enter the desired information into the Employee field. Enter " 01246857 ".
8.	Press [Tab] .
9.	The current date defaults into the Payroll Date field. This can be changed if needed.

Step	Action
10.	Press [Tab] .
11.	Notice that the Shift Code and the Shift Start/End times populate. This information reflects the employee's daily working hours on the Employee Main frame.



Labor Time Card (Version 2.0.0)

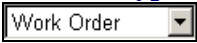
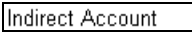

Employee: 01246857 Markus Smith Payroll Date: 21-Apr-2008 Total Time: 4 Hour(s)

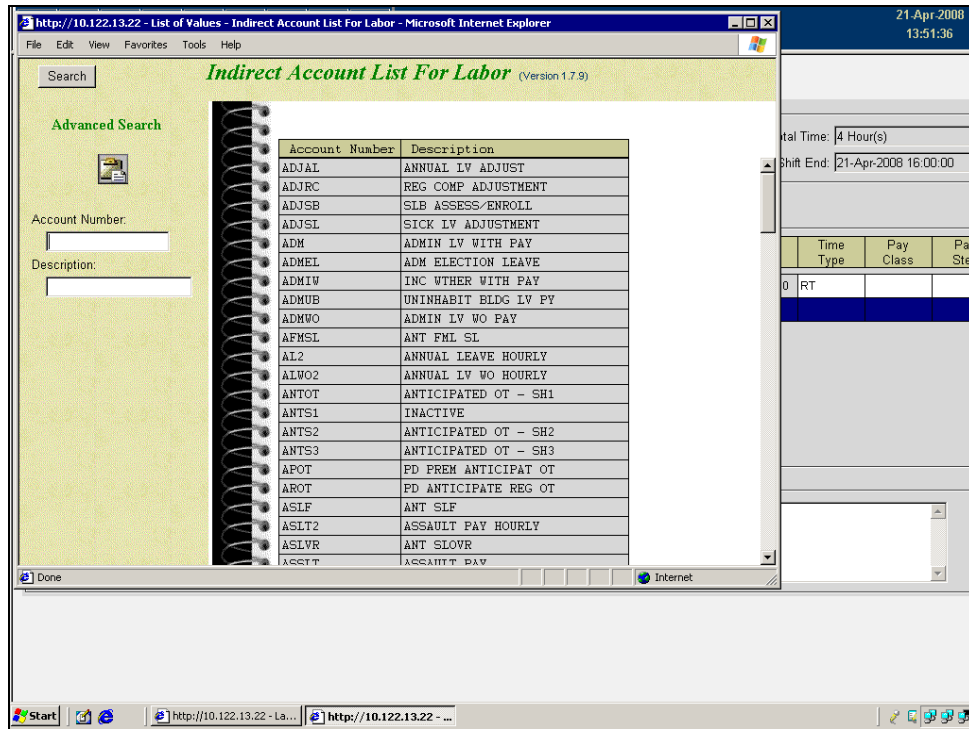
Shift Code: 2 FIRST SHIFT 7:00-4:00 Shift Start: 21-Apr-2008 07:00:00 Shift End: 21-Apr-2008 16:00:00



Time Entry (Loaded 1 records)

Type	Indirect / Work Order	Unit / Description	Job	Time (Rounded Hrs)	Time In	Time Out	Time Type	Pay Class	Pay Step
Work Order	30	S4UR55 - 2002 CHEV BLA	02-004-004	5	21-Apr-2008 07:00:00	21-Apr-2008 11:00:00	RT		
Work Order									

Labor Notes

Step	Action
12.	Click the Type list. 
13.	Click the Indirect Account list item. 
14.	Double-click in the Indirect/Work Order field. 
15.	The majority of the listed account numbers directly correlate with PeopleSoft Time Reporting Codes (TRC) and denote codes currently used by the State of Tennessee. Examples include annual leave and sick leave. Some of the listed account number are available for garages to denote (indirect) time such as spending time cleaning the shop or taking a shift break.



Step	Action
16.	Double-click in the Account Number field. 
17.	Enter the desired information into the Time field. Enter " 3.5 ".
18.	Press [Tab] .
19.	The Time In field populates with the current date and the time the employee's shift is set to begin. This can be changed to reflect true dates and times the work was performed.
20.	Press [Tab] .
21.	The Time Out field populates with the current date and will start with the employee's shift start time and add the hours spent on the job. In this scenario, the employee's spent 3.5 hours on the second task. The system calculates the completion of the task to be 14:30 or 2:30 p.m.
22.	The Time Type value automatically populates. Do not change this value.
23.	Click the Save button. 

Step	Action
24.	Congratulations! You now know how to enter time on the Labor Time Card screen for an indirect account. End of Procedure.

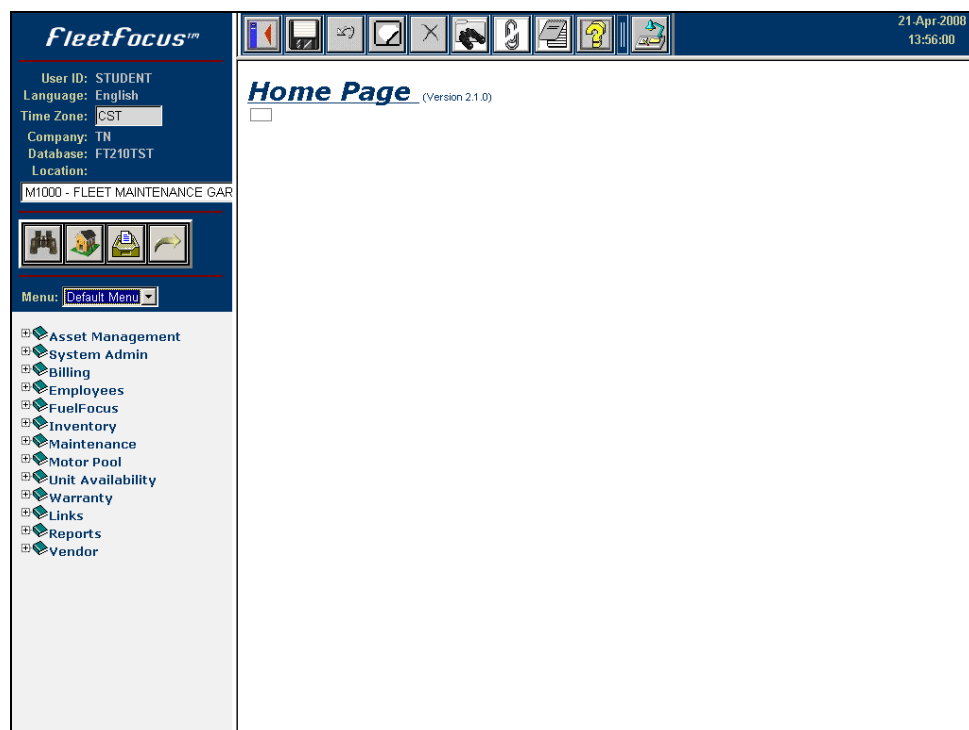
Correct Hours Worked on a Job/Indirect Account

For incorrectly entered labor charges, complete the following steps:

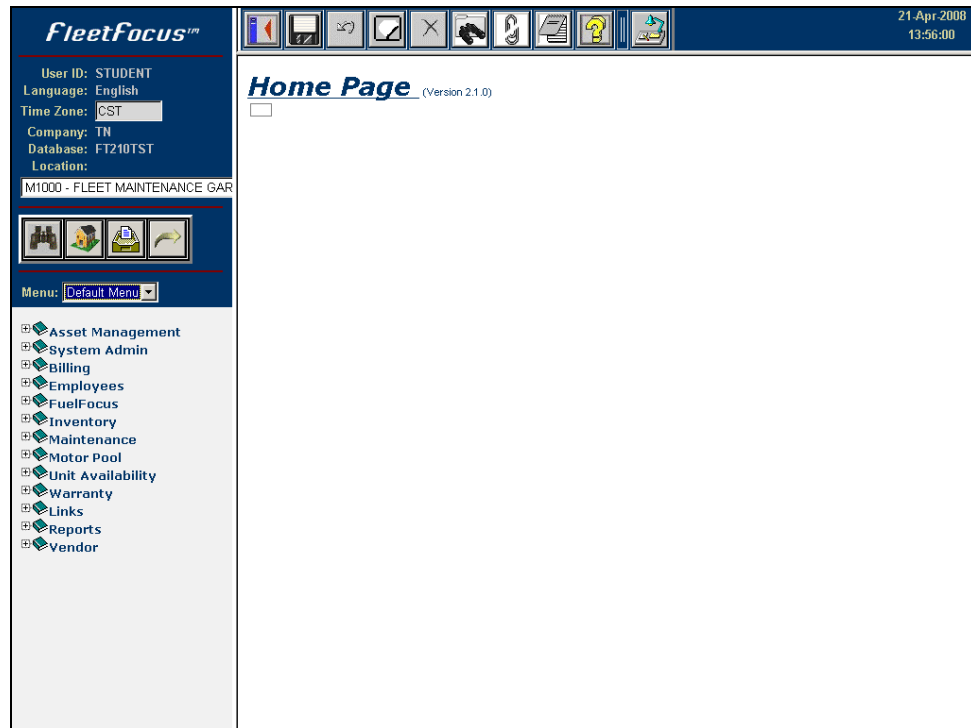
1. Navigate to the **Labor Time Card** frame.
2. Access the labor entry.
3. Correct the entry.
4. Save the record.





Procedure

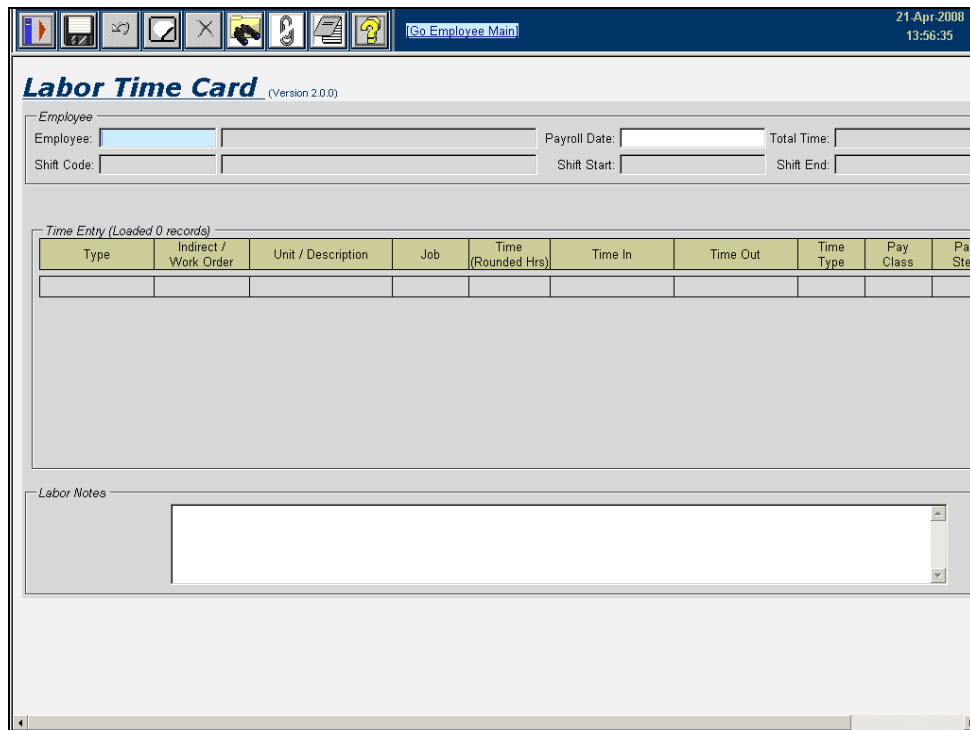
In this topic, you learn how to correct hours worked on a job.




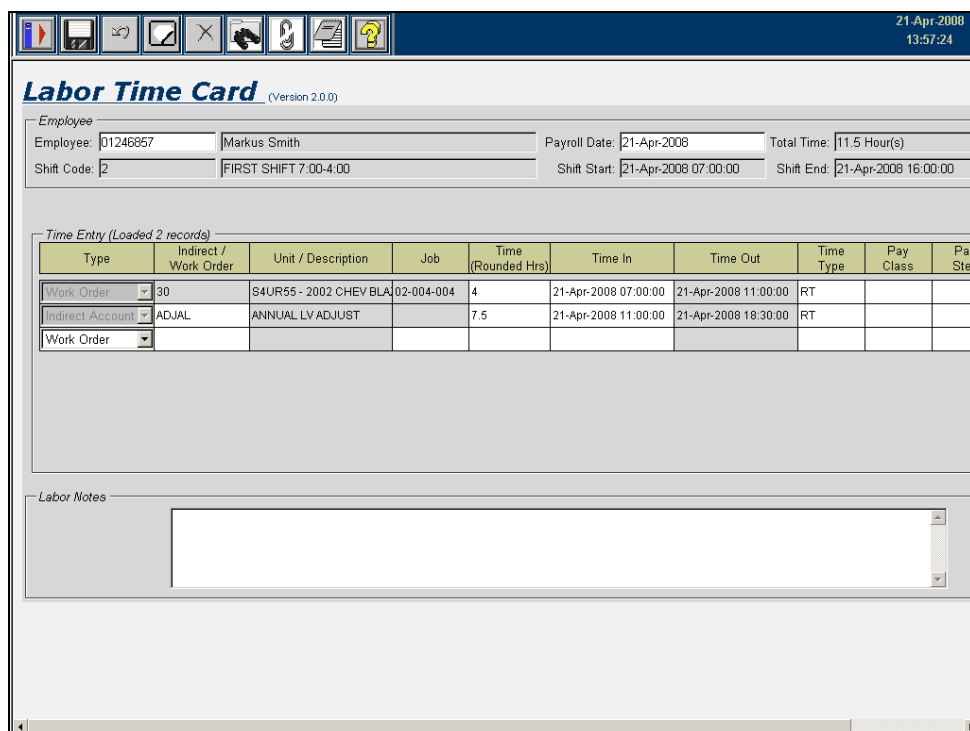
Step	Action
1.	<p>In this scenario, Markus Smith has notified you that he only worked 3 hours instead of 4 hours on April 21, 2008.</p> <p>Navigate to the Labor Time Card frame to make changes to the record.</p>



Step	Action
2.	<p>Click the Maintenance button.</p> 
3.	<p>Click the Labor Capture button.</p> 
4.	<p>Click the Labor Time Card link.</p> 
5.	<p>Click the Hide Menu button.</p> 



Step	Action
6.	You are now at the Labor Time Card frame, complete the following tasks: 1. Access the employee's information. 2. Make the appropriate change to the time entry. 3. Save the changes.
7.	Click in the Employee field. 
8.	Enter the desired information into the Employee field. Enter " 01246857 ".
9.	Press [Tab] .
10.	The Payroll Date populates with the current date. You can change this date, if necessary.
11.	Press [Tab] .



Labor Time Card (Version 2.0.0)


Employee: 01246857 Markus Smith Payroll Date: 21-Apr-2008 Total Time: 11.5 Hour(s)

Shift Code: 2 FIRST SHIFT 7:00-4:00 Shift Start: 21-Apr-2008 07:00:00 Shift End: 21-Apr-2008 16:00:00

Time Entry (Loaded 2 records)

Type	Indirect / Work Order	Unit / Description	Job	Time (Rounded Hrs)	Time In	Time Out	Time Type	Pay Class	Pay Step
Work Order	30	S4UR55 - 2002 CHEV BLA	02-004-004	4	21-Apr-2008 07:00:00	21-Apr-2008 11:00:00	RT		
Indirect Account	ADJAL	ANNUAL LV ADJUST		7.5	21-Apr-2008 11:00:00	21-Apr-2008 18:30:00	RT		

Labor Notes

Step	Action
12.	Click in the Time field. <input type="text" value="4"/>
13.	Enter the desired information into the field. Enter " 3 ".
14.	Click the Save button. 
15.	Congratulations! You now know how to correct hours worked on a job. End of Procedure.

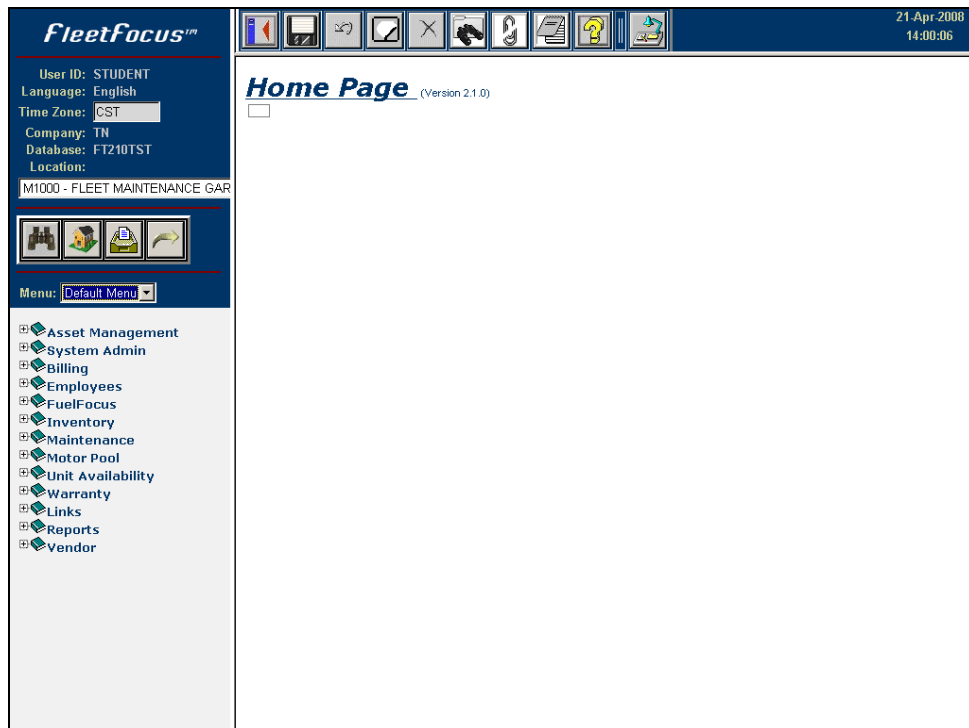
Delete a Labor Entry

You may delete an entire labor entry row on the **Labor Time Card** if it was incorrectly entered. Deleting the entry completely removes it from the timecard.

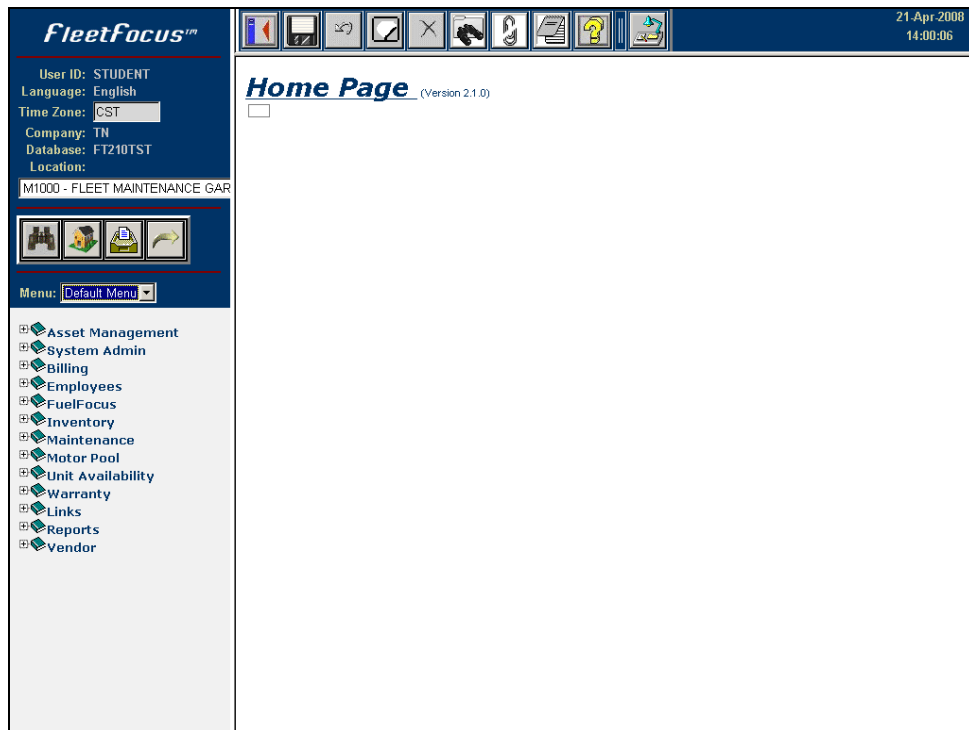
You must be complete this action before the payroll interface runs to PeopleSoft.




Procedure

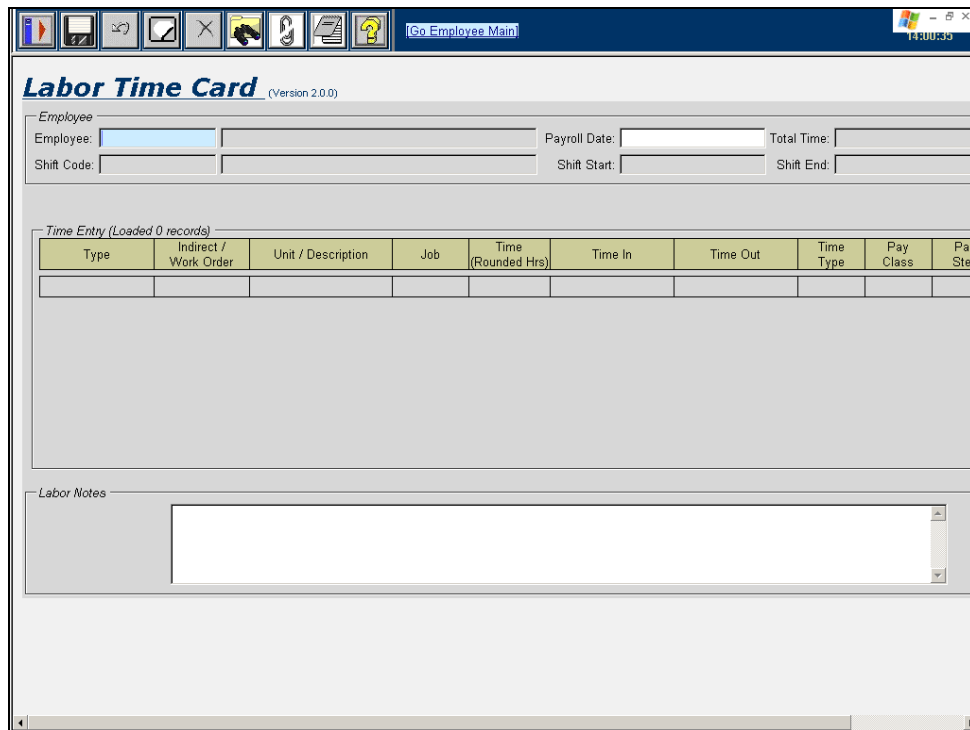
In this topic, you learn how to delete a labor entry on the **Labor Time Card** frame.




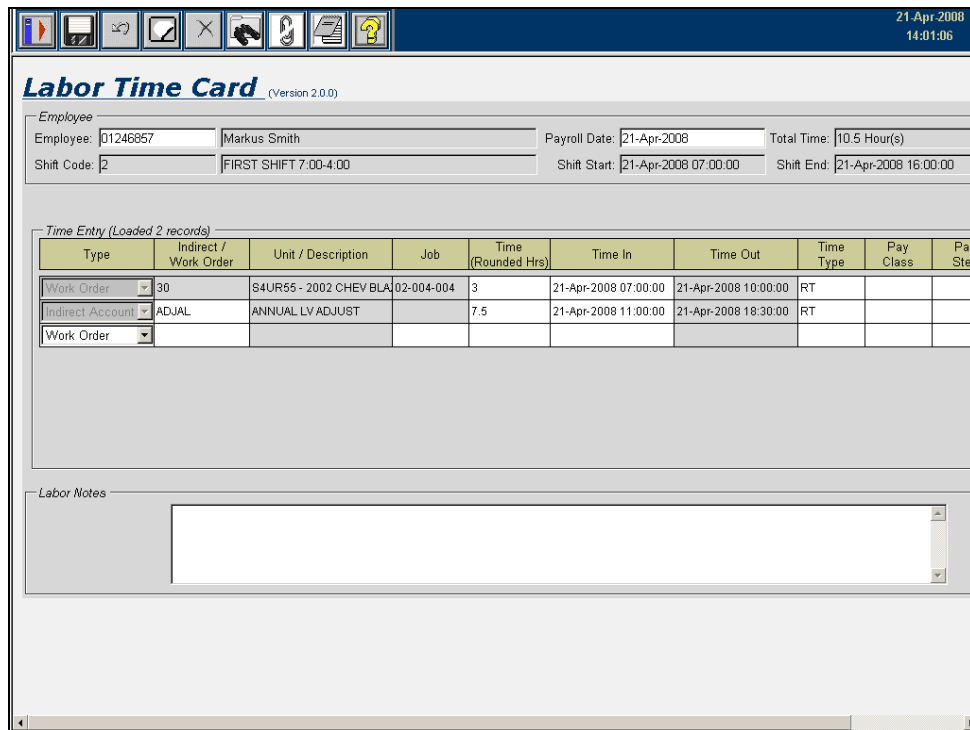
Step	Action
1.	<p>In this scenario, Markus Smith has a time entry that was not correct.</p> <p>Delete the time entry by completing the following steps:</p> <ol style="list-style-type: none"> 1. Navigate to the Labor Time Card. 2. Access the employee's record. 3. Highlight the entry you want to delete. 4. Delete the entry. 5. Save the changes to the record.



Step	Action
2.	Click the Maintenance button.  Maintenance
3.	Click the Labor Capture button.  Labor Capture
4.	Click the Labor Time Card link. Labor Time Card
5.	Click the Hide Menu button. 



Step	Action
6.	Click in the Employee field. 
7.	Enter the desired information into the Employee field. Enter " 01246857 ".
8.	Press [Tab] .
9.	The Payroll Date defaults in with the current date. You can change this date, if applicable.
10.	Press [Tab] .



Labor Time Card (Version 2.0.0)



Employee: 01246857 Markus Smith Payroll Date: 21-Apr-2008 Total Time: 10.5 Hour(s)

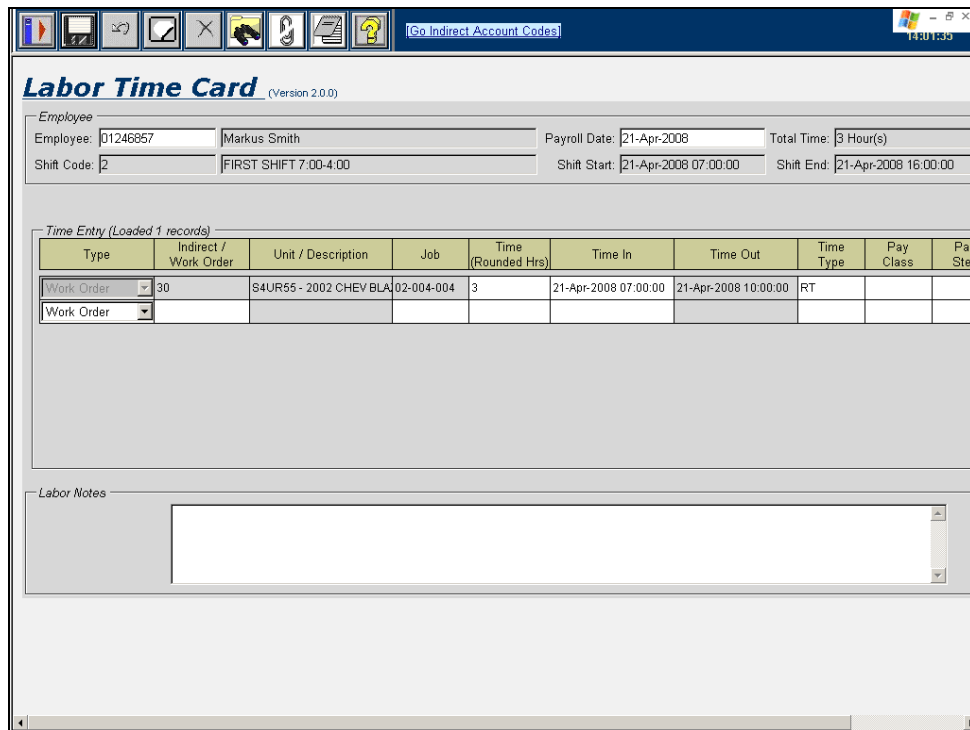
Shift Code: 2 FIRST SHIFT 7:00-4:00 Shift Start: 21-Apr-2008 07:00:00 Shift End: 21-Apr-2008 16:00:00

Time Entry (Loaded 2 records)

Type	Indirect / Work Order	Unit / Description	Job	Time (Rounded Hrs)	Time In	Time Out	Time Type	Pay Class	Pay Step
Work Order	30	S4UR55 - 2002 CHEV BLA	02-004-004	3	21-Apr-2008 07:00:00	21-Apr-2008 10:00:00	RT		
Indirect Account	ADJAL	ANNUAL LV ADJUST		7.5	21-Apr-2008 11:00:00	21-Apr-2008 18:30:00	RT		
Work Order									

Labor Notes

Step	Action
11.	Click in the Indirect/Work Order field to highlight the row you want to delete. This will activate the Delete icon. ADJAL
12.	Click the Delete button. 
13.	Click the Save button to remove this entry from the time card. 



Step	Action
14.	The time entry has been deleted and the changes to the record have been saved.
15.	Congratulations! You now know how to delete a labor entry from the timecard. End of Procedure.

Vehicle Information

Units in the M5 system are assets that require maintenance tracking. Units include not only vehicles and equipment; compressors, radios, or anything defined as an asset to be managed are also units.

All information related to a unit can be viewed on the **Unit Main** frame. This frame includes asset information, billing code, department assignments, meter information, and required operating licenses.

The **Unit Main** frame is view-only. Detailed unit information is managed at a higher level within the organization to ensure data is kept accurate and current.

Displaying Basic Unit Information

You can view unit information on the **Unit Main** frame in the M5 system.

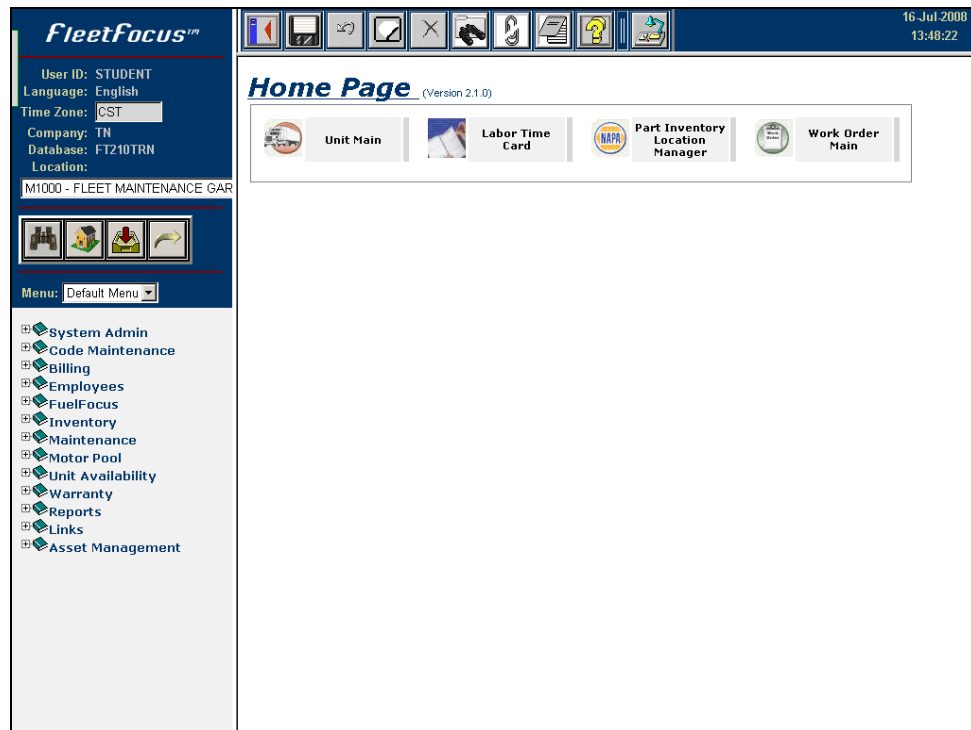
The **Unit Main** screen contains a unit information section and five sections with additional unit detail:






- Asset/Codes
- Dept/Locations
- Employee/Class
- Meter
- License/Notes

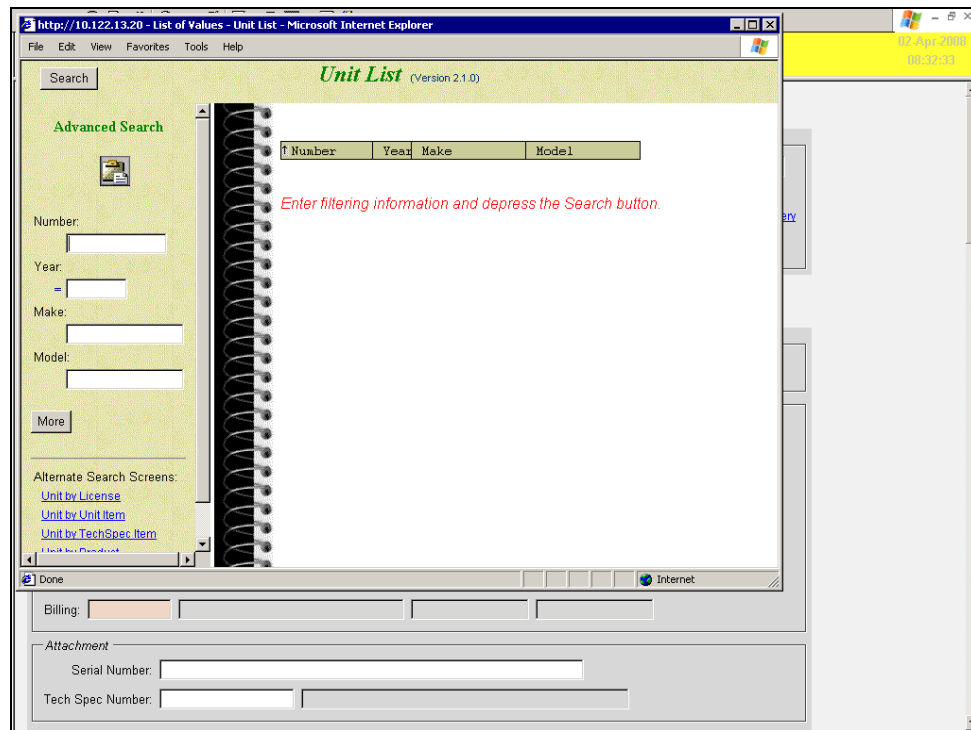
You can select hyperlinks to view other screens that reference the specific unit.

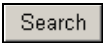
Procedure

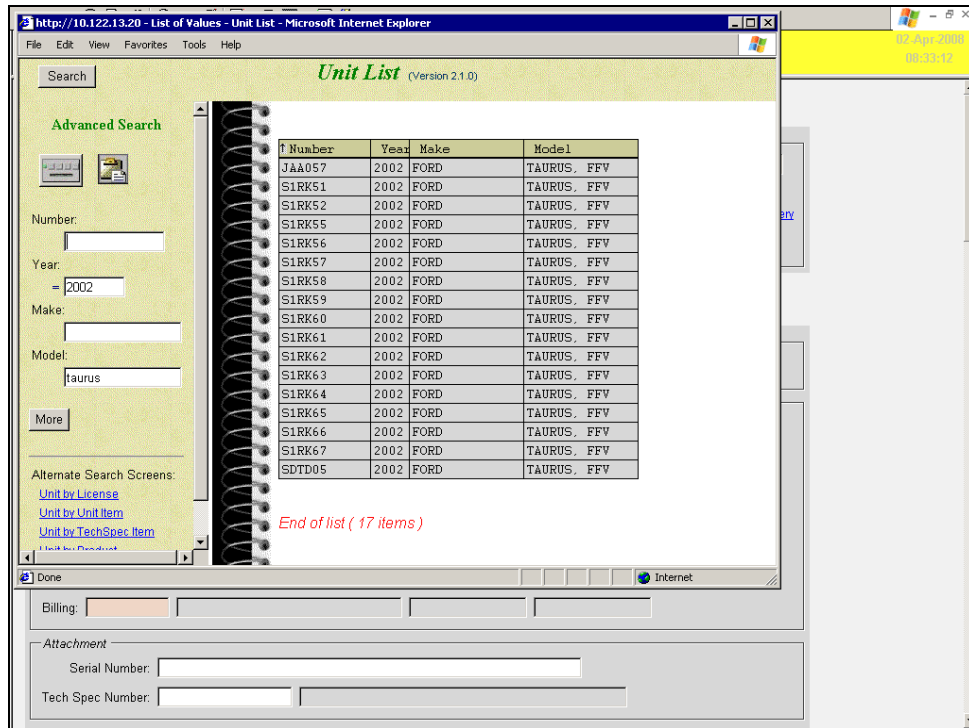
In this topic, you learn how to view unit information in the M5 system.



Step	Action
1.	Click the Asset Management link. 
2.	Click the Unit link. 
3.	Click the Main link. 
4.	Click the Hide Menu button. 
5.	Double-click in the Unit field. 



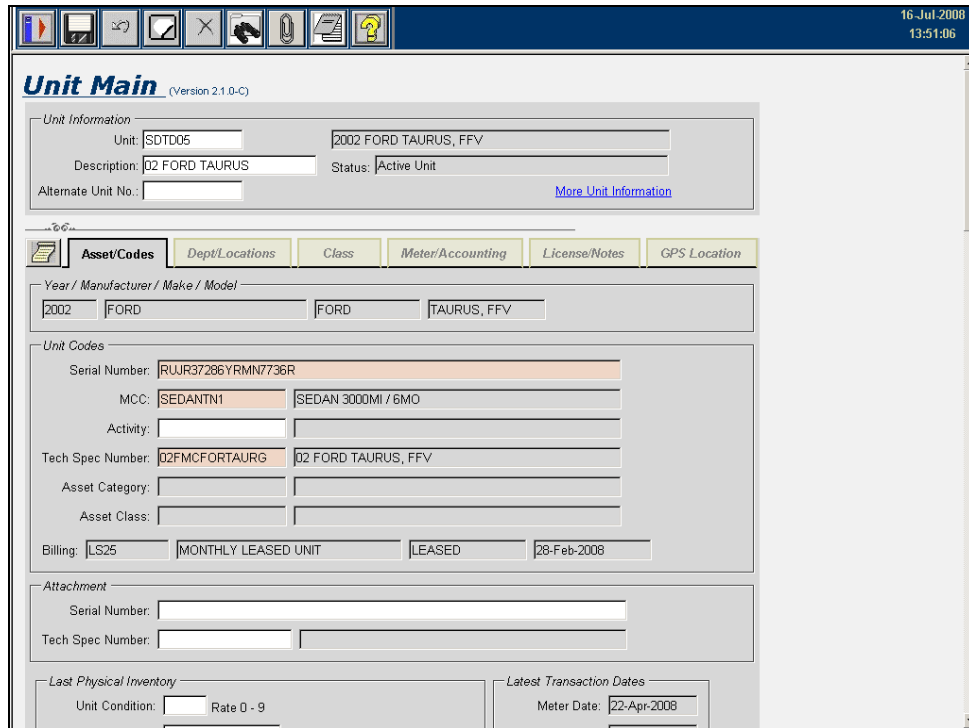
Step	Action
6.	From the Unit List window, search for a 2002 Taurus by specifying the Year and the Model .
7.	Enter the desired information into the Year field. Enter " 2002 ".
8.	Enter the desired information into the Model field. Enter " taurus ".
9.	Click the Search button. 



The screenshot shows a web browser window titled "http://10.122.13.20 - List of Values - Unit List - Microsoft Internet Explorer". The page is titled "Unit List (Version 2.1.0)". On the left, there is an "Advanced Search" section with input fields for "Number:", "Year:" (set to "2002"), "Make:" (set to "taurus"), and "Model:". Below these are links for "Alternate Search Screens: Unit by License, Unit by Unit Item, Unit by TechSpec Item". The main area displays a table of units with columns "Number", "Year", "Make", and "Model". The table lists 17 units, all from 2002, Ford Taurus FFV. The last unit in the list is "SDTD05". Below the table, it says "End of list (17 items)". At the bottom, there are fields for "Billing:", "Attachment", "Serial Number:", and "Tech Spec Number:".


Number	Year	Make	Model
JAA057	2002	FORD	TAURUS, FFV
S1RK51	2002	FORD	TAURUS, FFV
S1RK52	2002	FORD	TAURUS, FFV
S1RK55	2002	FORD	TAURUS, FFV
S1RK56	2002	FORD	TAURUS, FFV
S1RK57	2002	FORD	TAURUS, FFV
S1RK58	2002	FORD	TAURUS, FFV
S1RK59	2002	FORD	TAURUS, FFV
S1RK60	2002	FORD	TAURUS, FFV
S1RK61	2002	FORD	TAURUS, FFV
S1RK62	2002	FORD	TAURUS, FFV
S1RK63	2002	FORD	TAURUS, FFV
S1RK64	2002	FORD	TAURUS, FFV
S1RK65	2002	FORD	TAURUS, FFV
S1RK66	2002	FORD	TAURUS, FFV
S1RK67	2002	FORD	TAURUS, FFV
SDTD05	2002	FORD	TAURUS, FFV

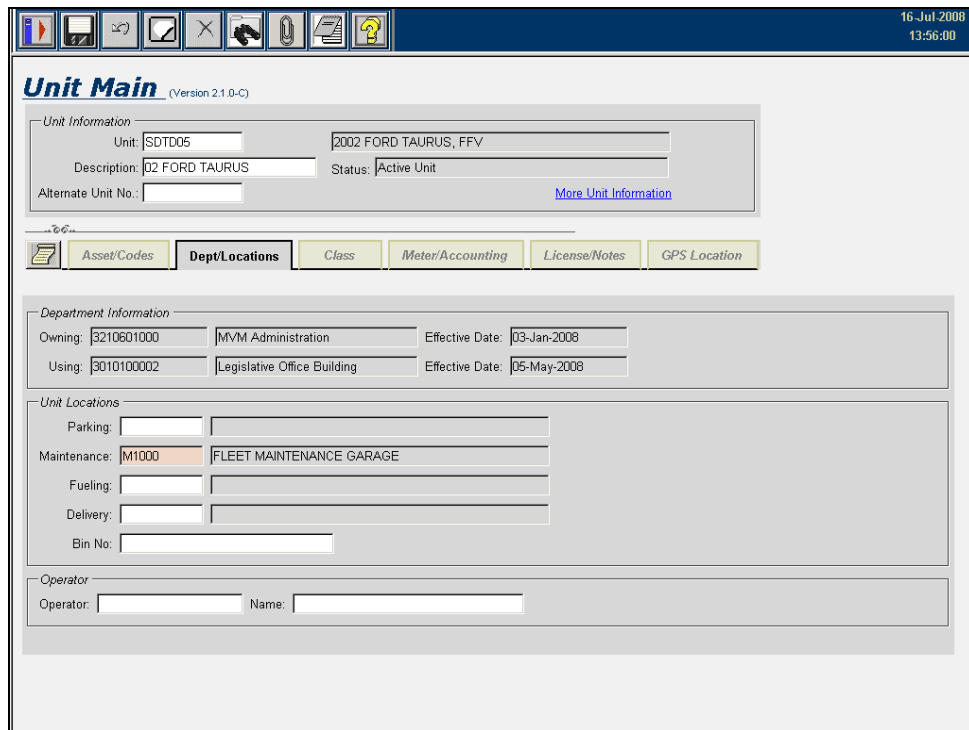
Step	Action
10.	The list of units matching your specified criteria display. Select the appropriate unit number for the job.
11.	Double-click in the SDTD05 value in the Number field. SDTD05



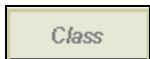
The screenshot shows the 'Unit Main' application window (Version 2.1.0-C). The window has a standard Windows-style title bar with icons for file operations and a status bar at the bottom right showing the date '16-Jul-2008' and time '13:51:06'. The main content area is divided into several sections:

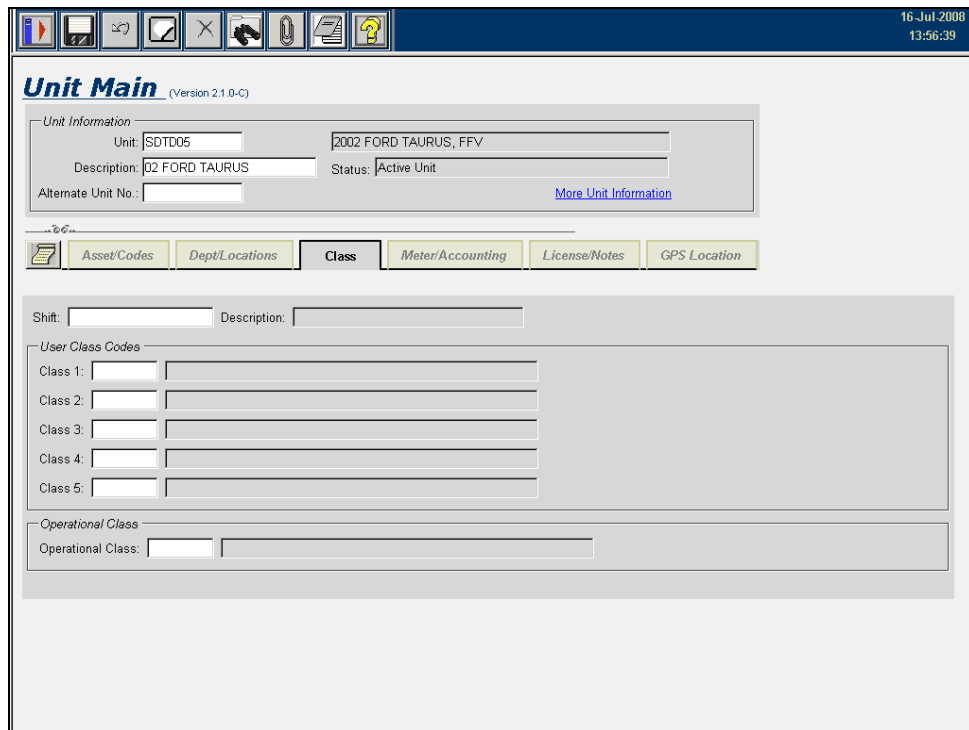
- Unit Information:** Contains fields for Unit (SDD05), Description (02 FORD TAURUS), Status (Active Unit), and Alternate Unit No. (empty). A 'More Unit Information' link is present.
- Navigation Tabs:** A row of tabs including 'Asset/Codes' (selected), 'Dept/Locations', 'Class', 'Meter/Accounting', 'License/Notes', and 'GPS Location'.
- Year / Manufacturer / Make / Model:** Fields showing '2002', 'FORD', 'FORD', and 'TAURUS, FFV'.
- Unit Codes:** A section with multiple fields:
 - Serial Number: RUJR37286YRNM7736R
 - MCC: SEDANTN1 (with a dropdown arrow) and SEDAN 3000Mi / 6MO
 - Activity: (empty field)
 - Tech Spec Number: 02FMCFORAURG (with a dropdown arrow) and 02 FORD TAURUS, FFV
 - Asset Category: (empty field)
 - Asset Class: (empty field)
 - Billing: LS25 (with a dropdown arrow), MONTHLY LEASED UNIT (with a dropdown arrow), LEASED (with a dropdown arrow), and 28-Feb-2008
- Attachment:** Fields for Serial Number and Tech Spec Number, both empty.
- Last Physical Inventory:** Unit Condition (empty field) and Rate 0 - 9.
- Latest Transaction Dates:** Meter Date: 22-Apr-2008.

Step	Action
12.	Notice that the related unit information now displays on the Unit Main screen.
13.	The Unit Main frame contains hyperlinks that allow you to view more information on a unit. To view these hyperlinks, hover over the More Unit Information hyperlink to view the list.
14.	The Asset/Codes tab displays information related to the unit. If needed, double-click in the fields to access the related list of values page.
15.	Click the Dept/Locations tab. 




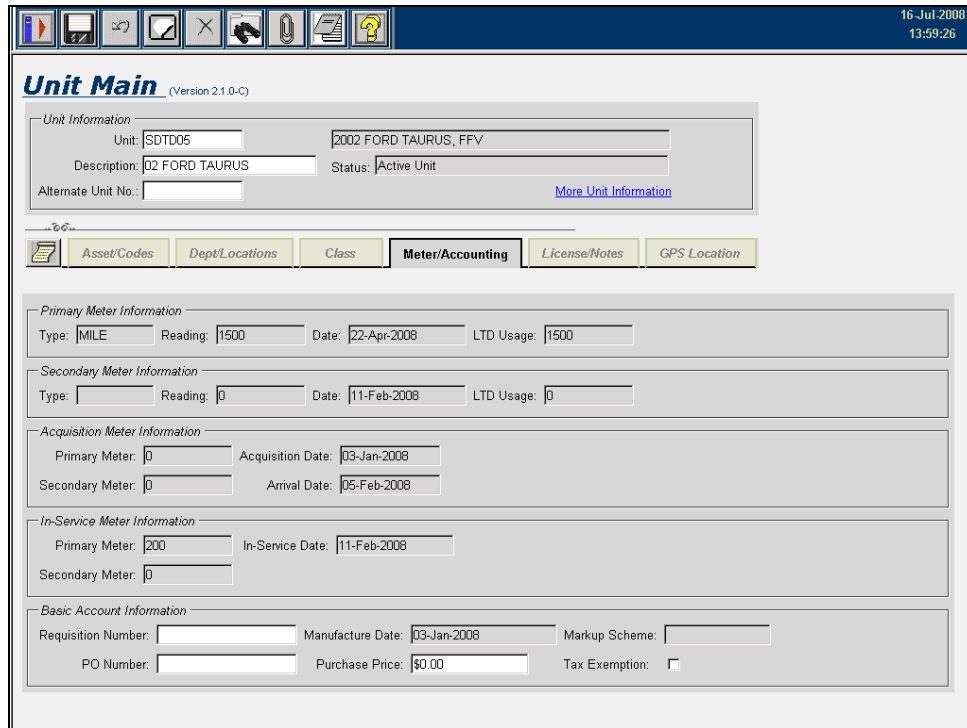
The screenshot shows the 'Unit Main' application window (Version 2.1.0-C) with a toolbar at the top. The 'Unit Information' section contains fields for Unit (S0TD05), Description (02 FORD TAURUS), Status (Active Unit), and Alternate Unit No. A 'More Unit Information' link is also present. Below this is a tabbed interface with tabs for Asset/Codes, Dept/Locations (selected), Class, Meter/Accounting, License/Notes, and GPS Location. The 'Dept/Locations' tab displays 'Department Information' with 'Owning' (3210601000, MYM Administration, Effective Date: 03-Jan-2008) and 'Using' (3010100002, Legislative Office Building, Effective Date: 05-May-2008) details. The 'Unit Locations' section includes fields for Parking, Maintenance (M1000, FLEET MAINTENANCE GARAGE), Fueling, Delivery, and Bin No. At the bottom, the 'Operator' section has fields for Operator and Name.

Step	Action
16.	The Dept/Locations tab displays information on the department that maintains and uses the unit in addition to other location information.
17.	Click the Class tab. <div data-bbox="318 1209 466 1266" data-label="Image">  </div>



The screenshot shows the 'Unit Main' application window (Version 2.1.0-C). The window has a standard Windows-style title bar with icons for file operations and a status bar showing the date '16-Jul-2008' and time '13:56:39'. The main content area is titled 'Unit Main' and contains a 'Unit Information' section with fields for Unit (S0TD05), Description (02 FORD TAURUS), Status (Active Unit), and Alternate Unit No. A 'More Unit Information' link is also present. Below this is a tabbed interface with tabs for 'Asset/Codes', 'Dept/Locations', 'Class' (which is selected), 'Meter/Accounting', 'License/Notes', and 'GPS Location'. The 'Class' tab displays a 'Shift' and 'Description' section, followed by 'User Class Codes' with five rows for Class 1 through Class 5, each with input fields. At the bottom of the 'Class' tab is an 'Operational Class' section with an input field.

Step	Action
18.	The Class tab displays Unit Class Code information. These codes will be assigned as is required by the State of Tennessee.
19.	Click the Meter/Accounting tab. 



Unit Main (Version 2.1.0-C)

Unit Information

Unit: SDD05 2002 FORD TAURUS, FFV

Description: 02 FORD TAURUS Status: Active Unit

Alternate Unit No.:

[More Unit Information](#)

Asset/Codes Dept/Locations Class **Meter/Accounting** License/Notes GPS Location

Primary Meter Information

Type: MILE Reading: 1500 Date: 22-Apr-2008 LTD Usage: 1500

Secondary Meter Information

Type: Reading: 0 Date: 11-Feb-2008 LTD Usage: 0

Acquisition Meter Information

Primary Meter: 0 Acquisition Date: 03-Jan-2008

Secondary Meter: 0 Arrival Date: 05-Feb-2008

In-Service Meter Information


Primary Meter: 200 In-Service Date: 11-Feb-2008

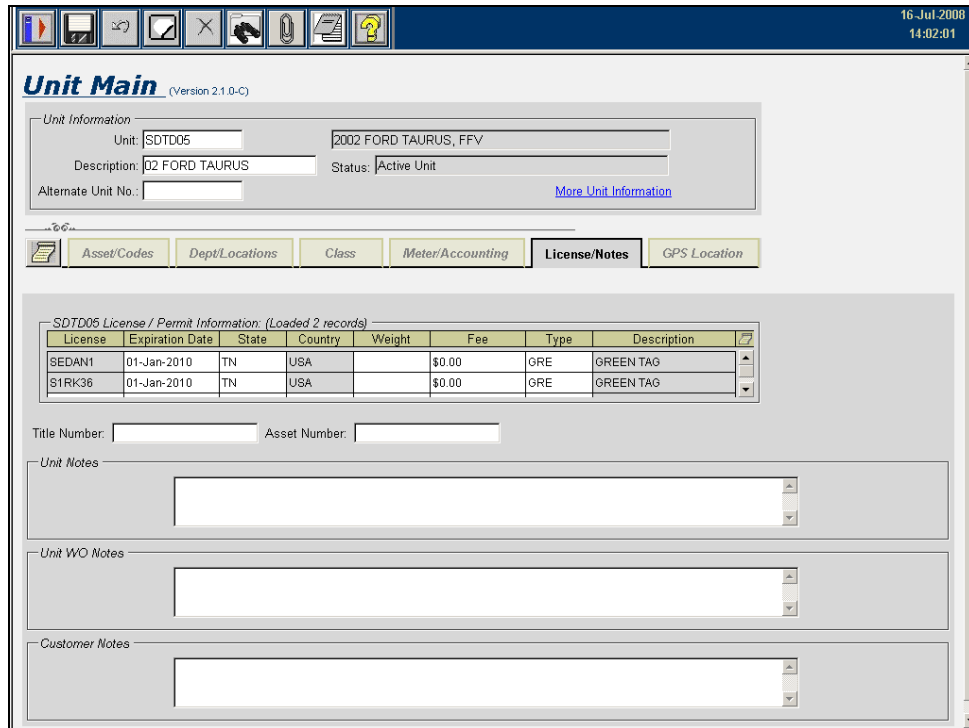
Secondary Meter: 0

Basic Account Information

Requisition Number: Manufacture Date: 03-Jan-2008 Markup Scheme:

PO Number: Purchase Price: \$0.00 Tax Exemption: ☐

Step	Action
20.	<p>The Meter/Accounting tab displays the units meter information.</p> <p>You can view the Primary meter, Secondary meter, along with the meter readings and applicable dates for the unit's acquisition and in-service.</p>
21.	<p>Each unit will have two meters - primary and secondary. Both meters display the current odometer reading which can be none, km, miles or hours.</p> <p>These are determined by the unit's MCC.</p>
22.	<p>Click the License/Notes tab.</p> <p></p>



The screenshot shows the 'Unit Main' application window (Version 2.1.0-C) with the 'License/Notes' tab selected. The window displays unit information for 'S0TD05', a 2002 Ford Taurus, FFV, with an active status. Below this, a table shows license and permit information for two records. The table has columns for License, Expiration Date, State, Country, Weight, Fee, Type, and Description. The first record is for a SEDAN1 with an expiration date of 01-Jan-2010, state of TN, USA, weight of \$0.00, fee of \$0.00, type of GRE, and description of GREEN TAG. The second record is for a S1RK36 with an expiration date of 01-Jan-2010, state of TN, USA, weight of \$0.00, fee of \$0.00, type of GRE, and description of GREEN TAG. Below the table, there are fields for Title Number and Asset Number, and three text areas for Unit Notes, Unit WO Notes, and Customer Notes.

License	Expiration Date	State	Country	Weight	Fee	Type	Description
SEDAN1	01-Jan-2010	TN	USA	\$0.00	\$0.00	GRE	GREEN TAG
S1RK36	01-Jan-2010	TN	USA	\$0.00	\$0.00	GRE	GREEN TAG

Step	Action
23.	The License/Notes tab displays information on the unit's license and permit information. If provided, you can also view any unit notes, unit work order notes, and customer notes.
24.	The GPS Location tab will not be used by the State of Tennessee.
25.	Congratulations! You now know how to view a unit's basic information. End of Procedure.

Queries

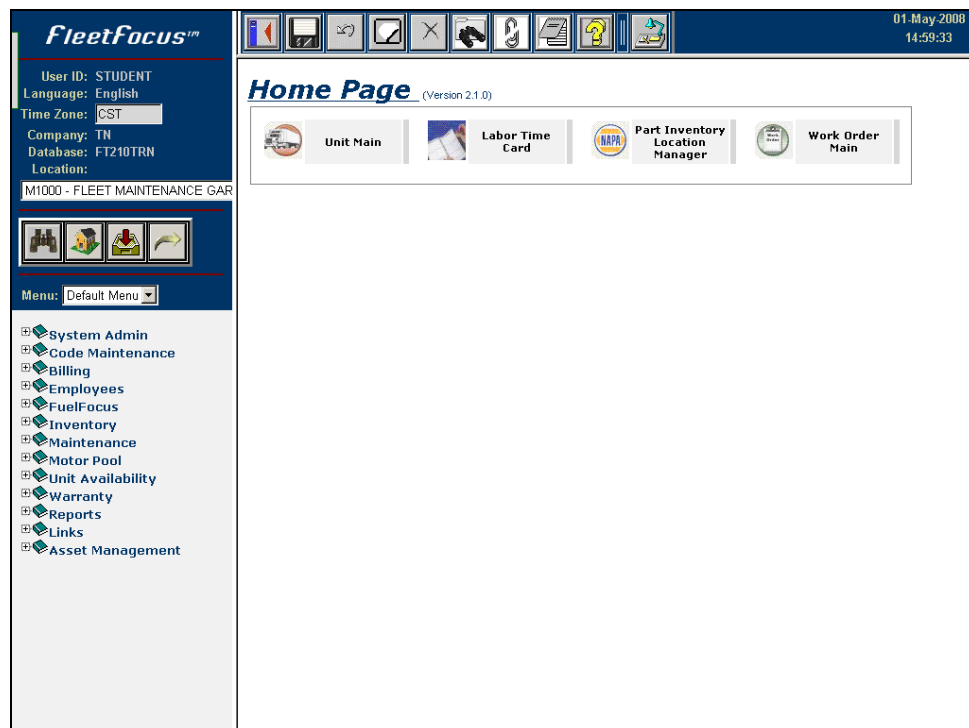
Queries allow you to enter basic search criteria into a specific query frame in order to view your desired information. You can make a query as specific or as broad as is needed.


Running a Work Order Query

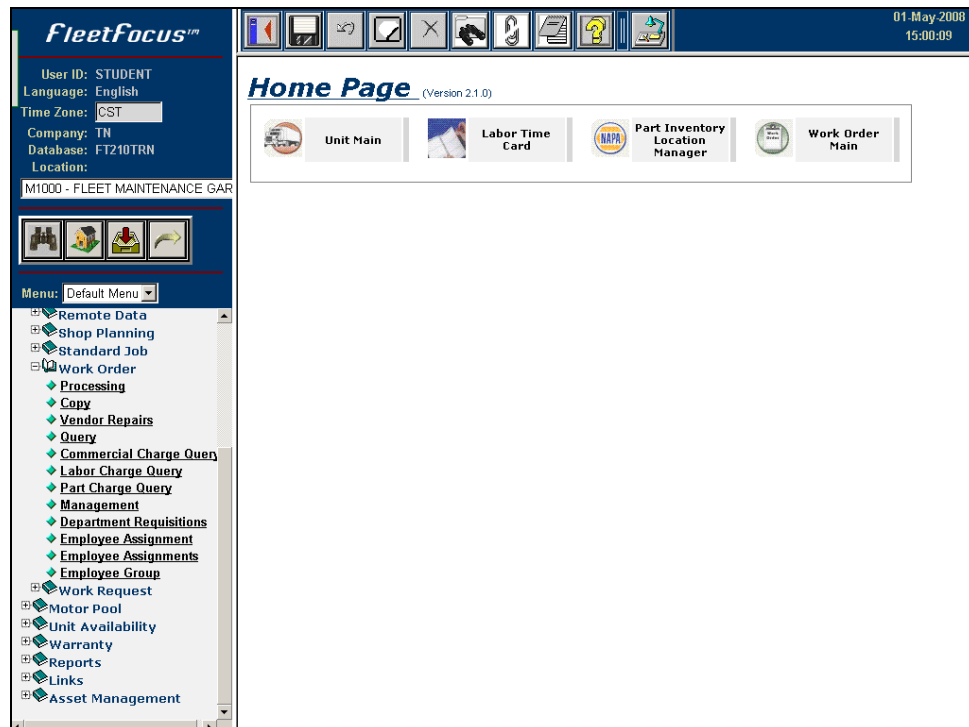
The **Work Order Query** allows you to view work orders for units, departments, or components. You can set your criteria to have the system return specific or general results.



Procedure


In this topic, you learn how to use the **Work Order Query** page to access and view a work order for a unit.

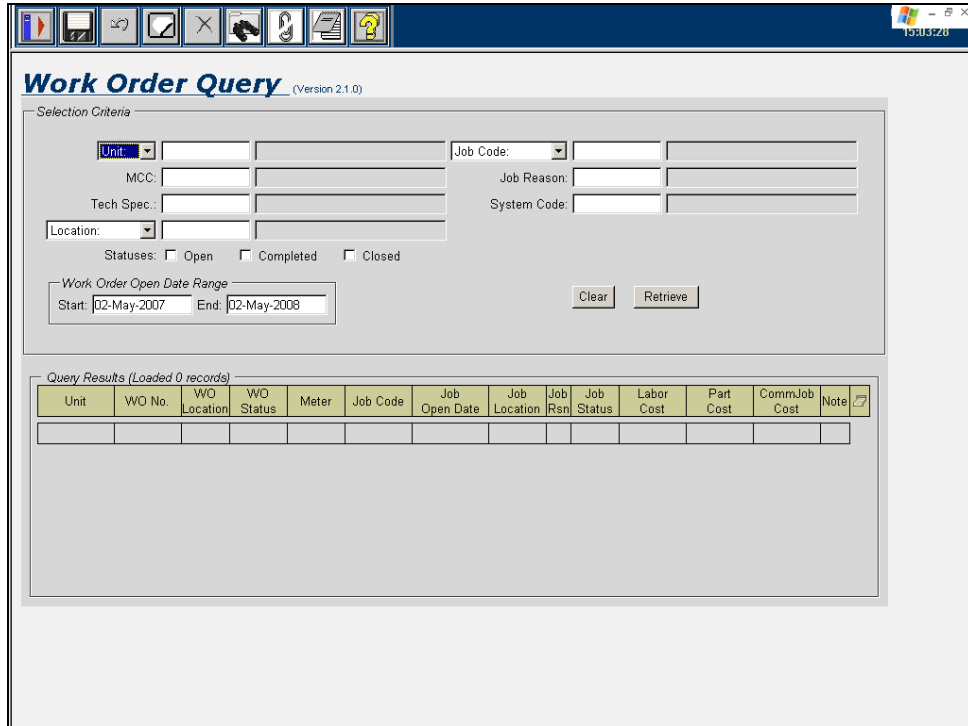



Step	Action
1.	<p>In this scenario, assume that you want to retrieve a list of all work orders for Unit SDTD25.</p> <p>To run a work order query, complete the following tasks:</p> <ol style="list-style-type: none"> 1. Navigate to the Work Order Query frame. 2. Enter your search criteria. 3. Click the Retrieve button to access the search results. <p>From your results, you can click to select the appropriate hyperlink to view the work order related to the unit.</p>
2.	<p>Click the Maintenance link.</p> 

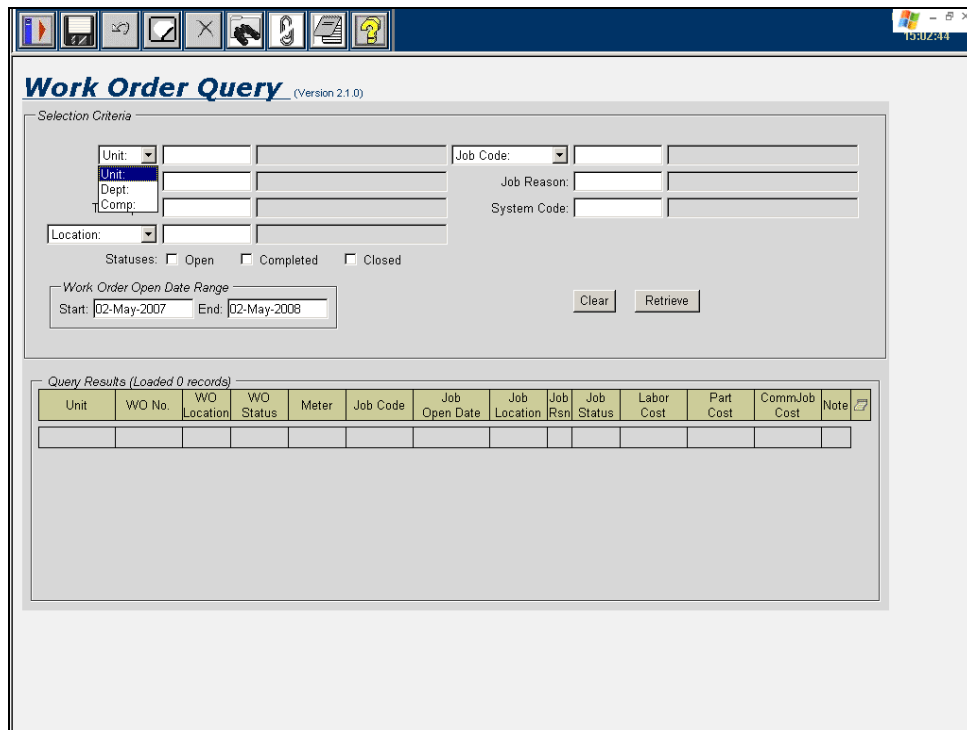





Step	Action
3.	<p>Click the Work Order link.</p> 
4.	<p>Click the Query link.</p> 

Step	Action
5.	Click the Hide Menu button. 



Step	Action
6.	Click the drop-down list. 



Step	Action
7.	You have the option of selecting a unit, department or component as your search criteria. When you select Unit as your search criteria, the system returns all results based on the unit you specify.
8.	Click the Unit list item. 
9.	Click in the value field. 
10.	Enter the desired information into the field. Enter " sdttd25 ".
11.	Once you have entered all of your search terms, click the Retrieve button.
12.	Click the Retrieve button. 

01-May-2008 15:05:32

Work Order Query (Version 2.1.0)

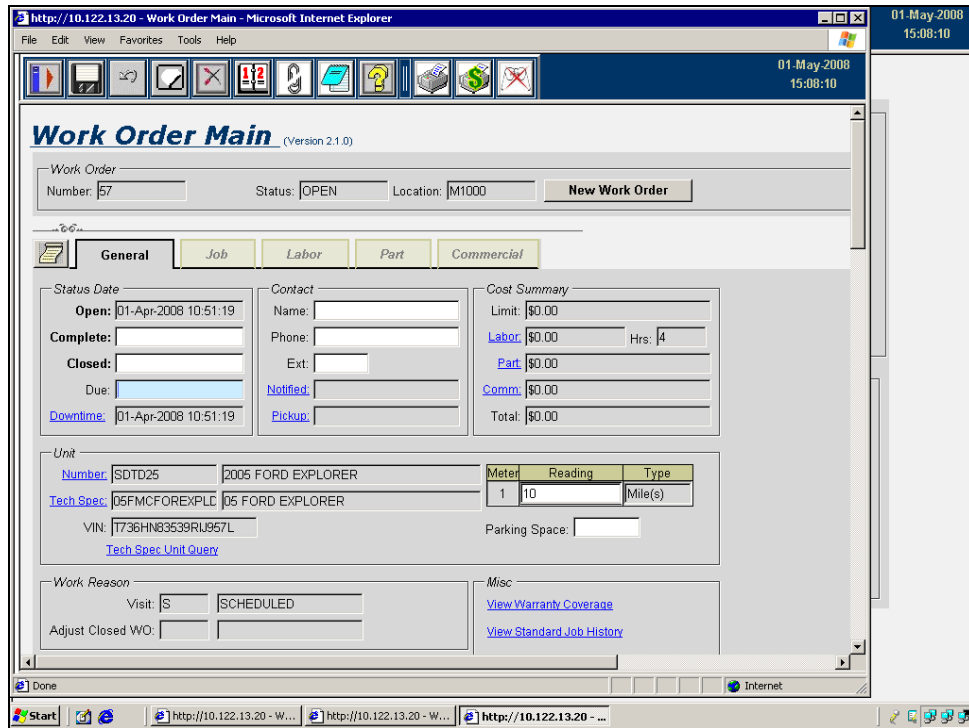
Selection Criteria

Unit: 2005 FORD EXPLORER Job Code:
MCC: Job Reason:
Tech Spec.: System Code:
Location:
Statuses: ☐ Open ☐ Completed ☐ Closed
Work Order Open Date Range
Start: End:

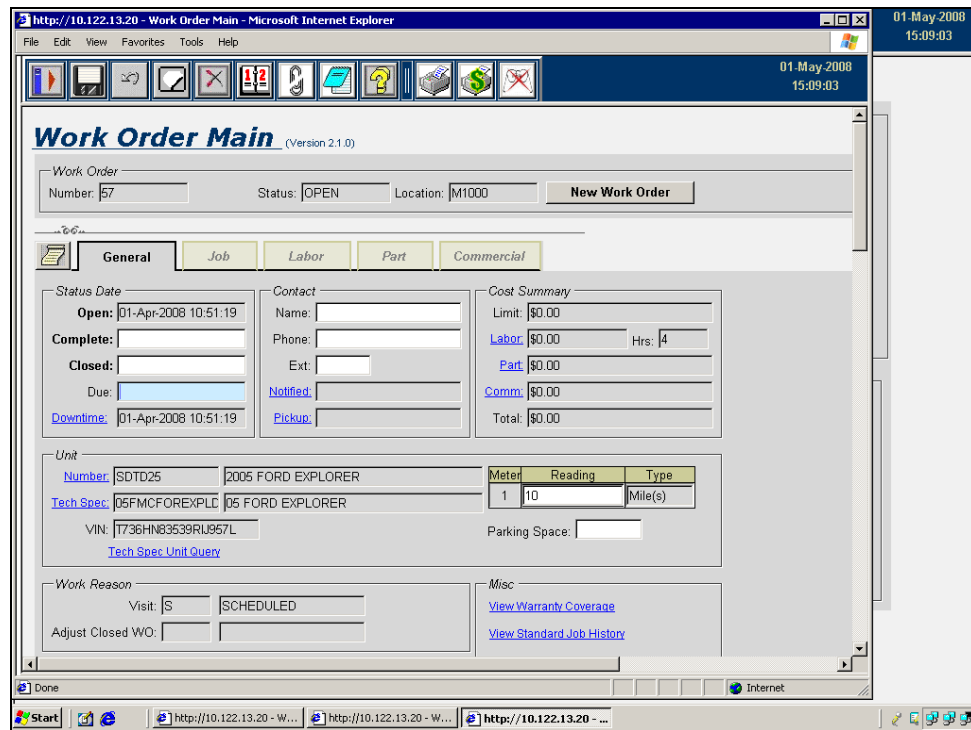
Unit SDTD25 Query Results (Loaded 4 records)


Unit	WO No.	WO Location	WO Status	Meter	Job Code	Job Open Date	Job Location	Job Rsn	Job Status	Labor Cost	Part Cost	CommJob Cost	Note
SDTD25	57	M1000	Open	10	02-003-004	01-Apr-2008	M1000	P	WFA	\$0.00	\$0.00	\$0.00	
SDTD25	56	M1000	Closed	10	02-003-004	01-Apr-2008	M1000	P	DON	\$0.00	\$0.00	\$0.00	
SDTD25	55	M1000	Closed	10	02-003-004	01-Apr-2008	M1000	P	DON	\$0.00	\$0.00	\$0.00	
SDTD25	53	M1000	Closed	10	16-021-019	24-Mar-2008	M1000	P	WR	\$0.00	\$0.00	\$50.00	

Step	Action
13.	Your search results display. Every work order that is assigned to this vehicle will show in the results table.
14.	Click on the blue hyperlink to open the original work order.
15.	Click the 57 link. 57



Step	Action
16.	<p>The Work Order Main page opens to display information for the work order you specified.</p> <p>You can also view the information on each tab if desired.</p>



Step	Action
17.	Click the Close button to return the query screen. 
18.	Congratulations! You now know how to run a work order query for a specific unit. End of Procedure.

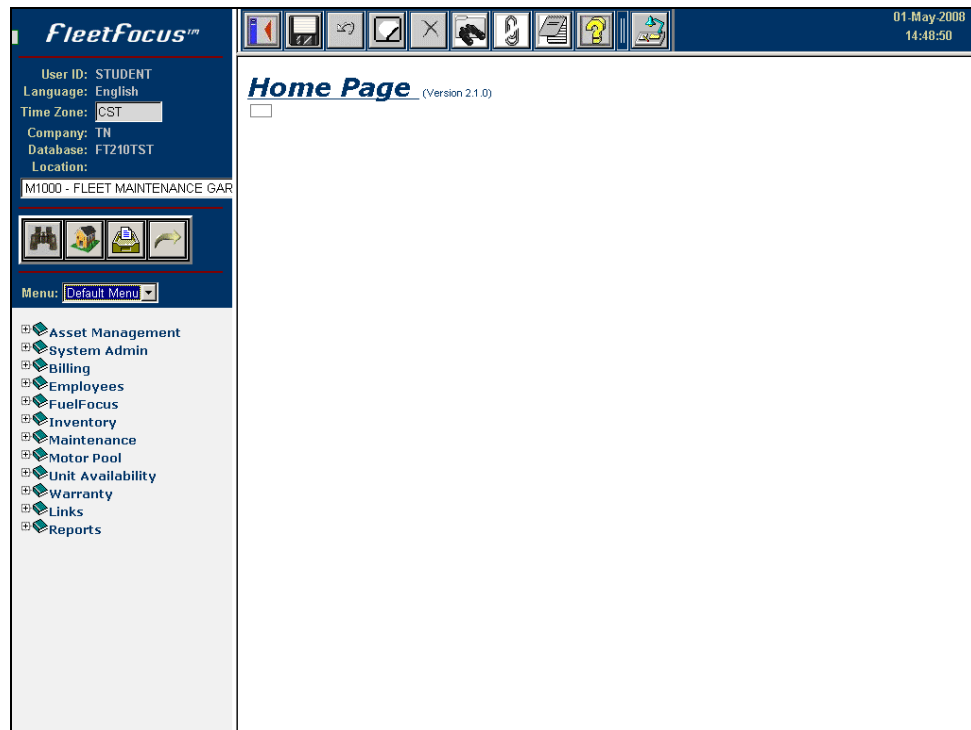
Running Tech Spec/Unit Item Query





The **Tech Spec/Unit Item Query** frame is used to view a specific unit and its associated tech spec along with any additional items that are associated with this unit.

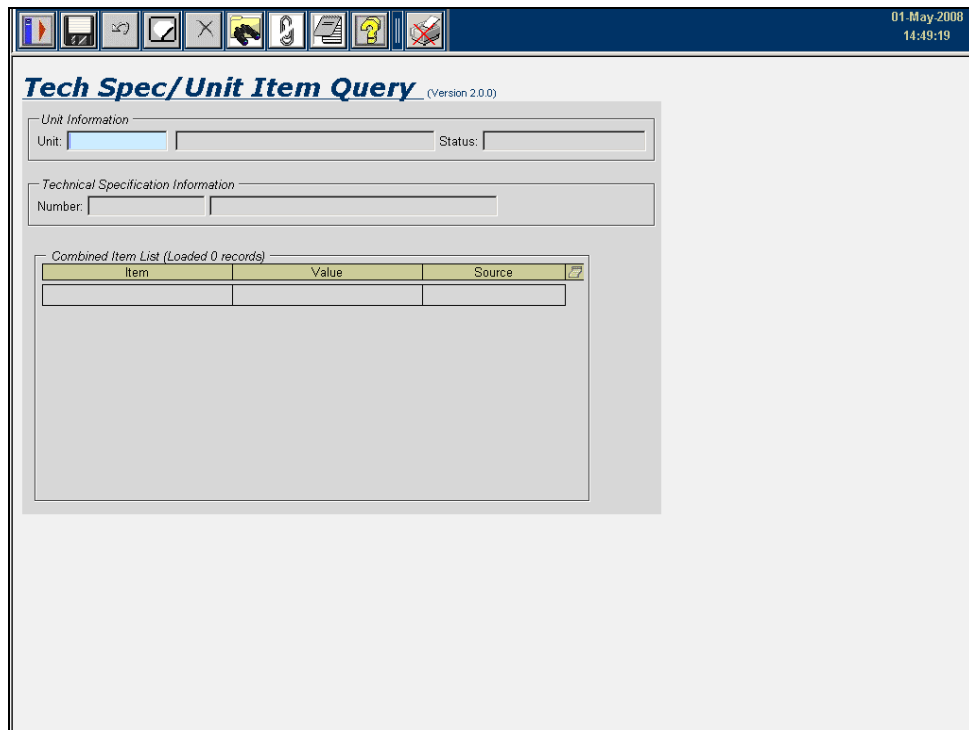
These items may not exist for every unit in the system, as each of these individual items must be set up separately on the **Unit Item** or **Tech Spec Item** frames.

Procedure

In this topic, you learn how to run a **Tech Spec/Unit Item Query**.



Step	Action
1.	Click the Asset Management button. 
2.	Click the Unit button. 
3.	Click the Tech Spec/Unit Item Query link. 
4.	Click the Hide Menu button. 




Tech Spec/Unit Item Query (Version 2.0.0)

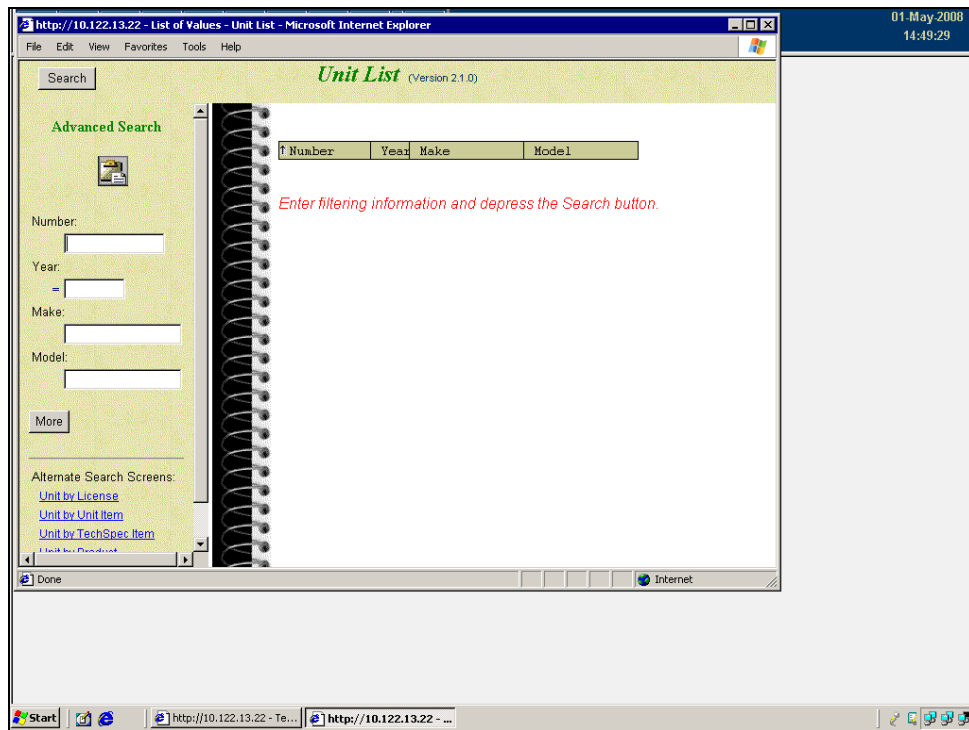
Unit Information
Unit: Status:



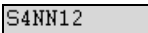
Technical Specification Information
Number:

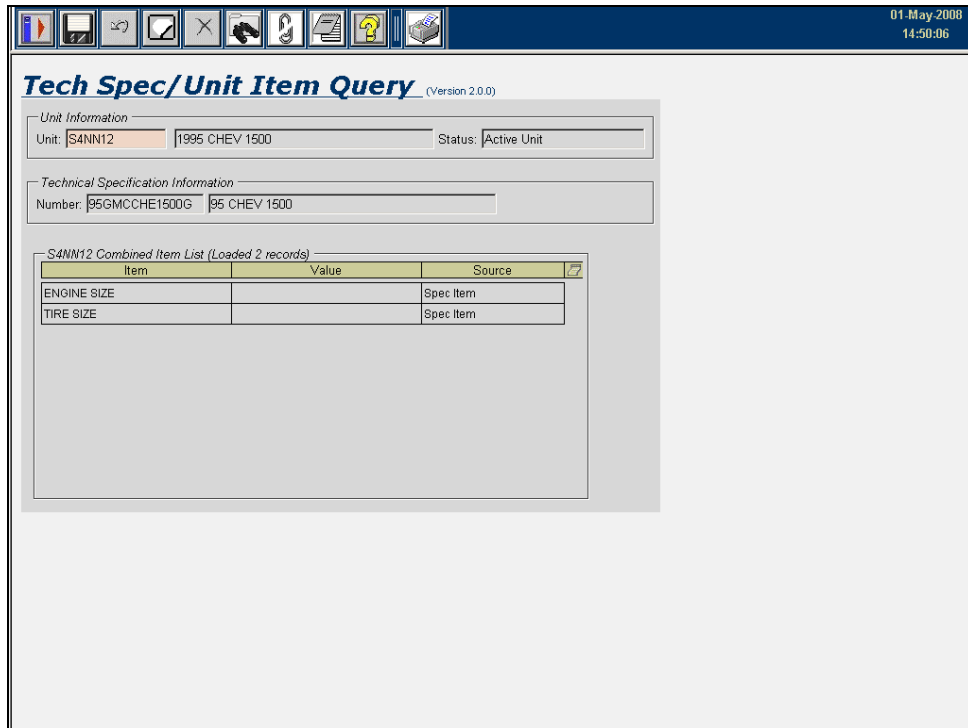
Combined Item List (Loaded 0 records)

Item	Value	Source

Step	Action
5.	Double-click in the Unit field to view the list of valid units. 



Step	Action
6.	Click in the Number field to filter the search results. 
7.	Enter the desired information into the Number field. Enter "s4".
8.	Click the Search button. 
9.	Double-click in the Number field to view the related unit information. 



The screenshot shows a web application window titled "Tech Spec/Unit Item Query" (Version 2.0.0). The interface includes a toolbar with various icons at the top. The main content area is divided into sections:

- Unit Information:** Contains fields for "Unit: S4NN12", "1995 CHEV 1500", and "Status: Active Unit".
- Technical Specification Information:** Contains a field for "Number: 95GMCHE1500G" and "95 CHEV 1500".
- S4NN12 Combined Item List (Loaded 2 records):** A table with the following data:

Item	Value	Source
ENGINE SIZE		Spec Item
TIRE SIZE		Spec Item

Step	Action
10.	The system displays the Tech Spec assigned to this specific unit.
11.	Not every unit queried will have associated items. These items are manually entered on a specific unit or a specific tech spec.
12.	A unit can have multiple items associated with it. Items are user-defined; they are set up to capture additional information not found elsewhere in the M5 system.
13.	Congratulations! You now know how to run a Tech Spec/Unit Item Query . End of Procedure.